GoldMine Premium Edition
Administrator Guide

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FrontRange Solutions is headquartered in California with offices in Colorado, United Kingdom, Germany, South Africa, Australia, Singapore, and China. For international locale information, refer to the Global Sites area of the FrontRange Solutions Web site.

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Welcome

Welcome to GoldMine® Premium Edition

GoldMine is a powerful tool designed to automate and manage your day-to-day business activities. Maintain business relationships, manage time, establish and achieve goals more easily than ever before with new features and enhancements in GoldMine Premium Edition.

GoldMine automates key areas of daily business activity:

- Client/contact management
- Time and task management
- Document and e-mail management
- Sales management
- Service Management

What's New in GoldMine Premium Edition?

Using GoldMine Online Help

For additional support, please visit: http://forums.frontrange.com/ and http://support.frontrange.com.

What's New Overview

GoldMine supports a variety of business processes with improved efficiency and automated administration. New features and enhancements make GoldMine Premium Edition more powerful and easy to use than ever.

- **New User Interface:** GoldMine Premium Edition has been designed with a sleek, modern look and feel. Navigation, automation, and communication are now more streamlined and uniform, for improved workflow efficiency and ease-of-use.
- **Customer Service Module (Service Center):** GoldMine Premium Edition includes a Customer Service Center module for tracking, resolving, and reporting customer service cases for GoldMine contacts.
- **Tabbed View:** Quicker navigation between open windows is now possible in GoldMine Premium Edition, thanks to a new tabbed view that utilizes available screen space more effectively. To enter the tabbed view, simply maximize any open window in the GoldMine workspace.
- **Auto-complete** capability has been added, improving speed and accuracy during such tasks as entering field data, or adding recipients to e-mail messages.
- **Tip of the day** offers helpful information about various features in GoldMine each time you open the application.

What's New in Version 8.0.2

- **Microsoft Windows Vista Support:** Install GoldMine on Microsoft's latest operating system. For more information, please refer to the GoldMine Premium Edition Installation Guide.

- **Microsoft Office 2007 Support:** GoldMine Plus for Microsoft Office, now part of the standard GoldMine installation, supports Microsoft Word and Excel 2007.
- **New Postal Code Import QuickStart Wizard:** Add over 42,000 United States Postal Codes to your database with one click using this new QuickStart Wizard.
- **Firebird Native Driver:** The Firebird Native Driver is now used for the most time-intensive operations, providing a 400% performance improvement for the slowest operations when using Firebird databases. Underlying code changes provide additional 40% performance improvements when using MSSQL databases as well.

Administration

Setting Up User Groups, Users, and Resources

Understanding Users and Security Access

GoldMine's security is based on user groups and users, which must be set up to make the security effective.

Each GoldMine user should have a unique user name and password. This is the first level of security. The GoldMine administrator assigns each user the minimum level of necessary access without restricting the functionality related to the user's job performance.

Define user groups according to the function users perform. User and user group security access applies to:

- **GoldMine Functions:** The administrator can permit or deny access to GoldMine functions. For example, permit or deny a user or user group the ability to create new Contact Records, delete records, or access other users' Calendars.
- **Menu Commands, Toolbar, and Taskbar Settings:** Remove menu items from the user's menu customizing the selection of available menu options and customize toolbars and the Taskbar.
- **Contact Databases:** Assign user groups access to databases. If a database is assigned to a user or user group, only members of the group can open the database in GoldMine. Each database can have different access restrictions.
- **Screens and Fields:** Restrict access rights to user-defined screens attached to particular contact databases. If a screen is public, all GoldMine users may view the information. If access is set to a user group, only members of the group may see the screen.
- **Record Ownership:** Each Contact Record is assigned an owner. The default owner is public; however, assign a record or group of records to a user or user group. If a record is owned by a group, each group member is treated as the owner of the record. Ownership determines whether a user who is not an owner can read all or part of the Contact Record or whether a user can edit the record.

The GoldMine administrator can also restrict access to such items as the Org Chart, InfoCenter entries, and the ability to launch HEAT from GoldMine Premium Edition.

Users with Master Rights can access all parts of the system and bypass all the security settings except for the user's:

- Personal Contacts
- PersonalBase files in the InfoCenter
- Encrypted e-mail

Master Rights users are the only users permitted to access and modify user settings. GoldMine administrators should have Master Rights.

User Groups

Creating User Groups

Logically group users according to functions they perform. User group names store in the Lookup table; user group members are encrypted in the User.dbt table.

1. Select **Tools>>User Groups**. The **User Groups Setup** dialog box appears.
2. Click **New**.
3. Type the **User Group's name** in the text box, and click **OK**. The user group displays in the User Groups box.
4. To add users, click **Members Setup**. The **Group Membership Setup** dialog box appears.
5. To add individual users or all members of an existing group to the **Group Members** box, double-click the user in the **User List**, or the group in the **Group List**, to add users to the **Group Members** list.
6. Click **OK**.
7. After creating groups and adding members, click **Close**.

Users

About User Properties

Control a user's security access in GoldMine through the User Properties.

- **Profile Tab**: Defines security, automatic record ownership, and forced log-out for a user.
- **Membership Tab**: Assigns or removes a user from a group.
- **Access Tab**: Sets general security to control user access to GoldMine features.
- **Menu Tab**: Configures menu options available to the user.
- **Time Clock Tab**: Displays a log showing the user's activity in GoldMine.

Best practices for a GoldMine administrator: create one or several ideal users to reflect basic settings applicable to many users. For example, you may have two prototype users: Sales Staff and Supervisor. Each of these user types has different rights and menus in GoldMine. Allow the Sales Staff to add and edit new contacts but not to delete contacts or view other's calendars. The Supervisor can add and delete contacts and view anyone's calendar. After the ideal user or users are created, clone the user's settings for each actual user with the same rights.

About User Preferences

Define GoldMine settings unique to you. GoldMine saves User Preference settings in your user's initialization file (username.ini).

Note: While **User Preferences** let users customize their work environment, many GoldMine administrators configure these settings for users and then restrict their ability to change the preferences.

Tip for Administrators: To restrict the user's access to the **User Preferences** dialog box, select **Tools>>Users' Settings**. Select a user from the list, and click **Properties**, then select **Menu**. Choose available main menu items for the selected user and click **Save**. Menu layouts can be saved for instant recall for any user.

User Preferences Tabs

- **Personal:** Change your password and add personal information.

- **Record:** Control the appearance of Contact records, tab displays, and zip code validation.
- **Calendar:** Determine calender appearance and functions.
- **Schedule:** Set parameters for scheduling and working with activities.
- **Alarms:** Configure GoldMine alarms.
- **Lookup:** Set display options for Contact records and the Contact Search Center.
- **Email**: Configure settings for your e-mail server, login information, and rules to apply when sending and receiving e-mail.
- **Telephony:** Control settings for your computer's modem and dialing options and SoftPhone advanced settings in GoldMine.
- **Pager:** Identify your pager's telephone number and PIN number.
- **Login:** Determine the locations of the GoldMine default databases and system files, and other system settings. This tab is available only to users with Master Rights.
- **Speller:** Specify GoldMine spell checking options.
- **System:** Set date and time settings. Select classic navigation and taskbar settings, and specify an Outlook username, if different than your GoldMine username.

Setting the User Profile

Use the **Profile** tab to create and set basic user information such as a user name, initial security, and force log out.

1. Select **Tools>>Users' Settings**. The **Users' Master File** dialog box appears.
2. Click **New** to create a new user, or select an existing user and click **Properties**.
3. The user's **Properties** dialog box appears. Click the **Profile** tab.
4. Type the **Username** (up to 8 characters; must begin with a letter).
5. Type the user's **Full Name**.
6. In the **Security** area configure these settings:
   - **Master Rights:** Select to give the user unrestricted access to all of GoldMine.
   - **Password:** Type the password assigned to the user. You must provide the user name and password you created so the user can log into GoldMine.
   - **Valid for days:** In the drop-down list, select the number of days the user's password is valid, or accept the default (Always).
   - **Next change:** If you change the Valid for days field, select the date the password becomes invalid and the user cannot launch GoldMine.
   - **Ownership:** Displays the **New Record Ownership** dialog box. Ownership lets you specify whether the new Contact Records the user adds to the database are public records or owned by a specific user or user group.
7. In the **Forced log out** area:
   - **Forced log out time:** Select the time of day to automatically log the user out of GoldMine.

Note: This is useful for making your system available for nightly maintenance, without forcing users to log out during the business day.

   - **When idle for:** Select the period of inactivity for users before they are automatically logged out of GoldMine.

Tip: For an administrator, the **Force log out** options are important in managing a limited number of licenses. Also, many maintenance functions can be performed only if all users are logged out of GoldMine.

Note: In order to activate forced logout, set both **Forced log out time** and **When idle for** parameters.

8. Click **OK** to save the user's **Profile** settings without configuring the detailed user security settings, or click the **Membership** tab to continue configuring the user's properties.

Cloning User Settings

After creating an ideal user with settings applying to many users, clone the user's Properties. All security settings in the User Properties apply to the new user except the Username, Full Name, and Password on the Profile tab.

1. Select **Tools>>Users' Settings**.
2. Right-click the user whose settings to clone and select **Clone**.
3. The **New User Properties** dialog box appears. Type **Username**, **Full Name**, and **Password**; select the other **Profile** settings. **Membership**, **Access**, and **Menu** settings apply to the new user.
4. Change the individual User Properties as needed.
5. Click **OK**.

Updating Undocked Users

Caution: Do not allow undocked users to synchronize with an updated GoldMine system until that undocked user has updated to the same version the updated site is using.

To update undocked users after performing a NetUpdate on the main GoldMine system, locate the gmsetup.exe file. Depending on how undocked users communicate with the network and GoldMine system and on the connection speed, send the gmsetup.exe file to the undocked user by putting it on CD, posting it on an FTP site, e-mailing it, or placing it on an accessible network drive.

Include directions on executing the gmsetup.exe file and what undocked users should expect after the upgrade.

After the undocked users update to the same version of GoldMine, they can use NetUpdate to sync with the master site.

To perform the update, click **Net-Update Now** and follow the prompts. To change the registration information, select **Update Registration Information**.

.INI Files and Macros

About the Username.ini and Username.tbi

GoldMine contains .ini files (initialization files) that define program and user parameters. Each GoldMine user has a username.ini and username.tbi (the user's login name followed by the file extension; for instance, if the user's login is JohnS then the user's .ini file is johns.ini). The username.ini stores preferences and is in the GoldMine directory. The username.tbi file stores the user's taskbar settings.

Username.ini

This file controls user settings not set from interface menus. GoldMine generates some default username.ini settings.

(View default Username.ini settings)

Section	Command	Options	Notes
[Internet]	ShowPreview=	0 -- Preview off 1 -- Preview on	E-mail Center Preview settings can be toggled on/off. Right-click an object in the tree pane and select Show Preview.
	BodySizeLimitKB=	Size in KB	Increase the amount of a e-mail message previewed in the E-mail pane.
[GoldMine]	AutoFillAddlAddress=	1 -- Auto-fill selected by default	When creating an additional contact on the Contacts tab, use the primary contact's address information to automatically populate the address fields.
	AutoFillEmailAddr=	1 -- Auto-fill selected by default	Auto-fills new e-mail addresses with the @<domain.name> of the selected primary e-mail address.

Add or modify command statements to username.ini to customize:

- Access to macros of another user
- Title bar display
- Modem and dialing settings
- Configurations for messaging activities

GoldMine updates most of the settings in the username.ini when settings in preferences, toolbars, and other user areas of GoldMine are changed. Manually add or change the settings by editing the file with a text editor.

GoldMine organizes settings in this format:

```
[Section]
Setting=x
```

where the section name always appears in brackets, setting is the specified setting, and (x) represents the value of the designated setting. Be sure to place each new command in the correct section of Username.ini. However, the order of statements within a section does not affect proper execution.

(View GoldMine section options)

Setting	Option	Description
Followup=	1	Instructs GoldMine to automatically select the Schedule a follow-up check box when completing an activity.
SyncActiveObj=	1	Syncs the current contact record object with the highlighted activity in the activity list.
SyncGroupObj=	1	Syncs the contact record object as the contact if a group listing is changed.
PubForm=	1	Show **(public)** user forms in the merge forms menu.
PubFilter=	1	Show **(public)** user filters in the filters menu.
ROTabs=	1	Lets you change labels on the tabs. Type new labels in the order the tabs display on the screen with commas separating the labels and no spaces. For example, **Summary,Notes,Fields**.
ROTitle=	1	Displays the contact name in the record object title bar.
MacFile=	2	Uses the macros of the user specified.

To change settings, open the Username.ini file:

- From Windows Explorer, double-click username.ini; the file opens in Notepad.
- From a text editor (such as Notepad), select **File>>Open**. Navigate to the GoldMine directory and select username.ini.

To customize the file with command statements, see:

- Setting E-mail Preview Text Amounts
- Setting E-mail Preview On or Off
- Setting Keep or Clear on Tagged Records
- Setting Calendar Publishing Output to XML

Note: For best results, backup your .ini file before adding or changing any settings, and change only settings exactly as described in the online Help topics or contact Technical Support.

Username.tbi

Copy entire taskbars or just task groups from one user to another. The taskbar has one section, called [gmbar]. If you delete the username.tbi, you must log back into GoldMine as the user to recreate the file; however, it only has global task groups. You must copy or manually create the task groups.

Recording Macros

1. With Macro buttons activated in the Global Toolbar, click **Record**. The macro is ready to record. Also start the recording process by typing **CTRL+SHIFT+HOME**.

Tip: Record a macro using keystrokes rather than mouse-clicks. To use the GoldMine menus, type **ALT+Underlined letter of menu item**. Use the arrow keys to navigate the menu options.

2. Begin the steps to record. When finished, click **Stop** on the Global Toolbar or press **CTRL+SHIFT+END**. The **Define Macro Button** dialog box appears.
3. In the **Status Bar Description** text box, type a description of the macro to serve as the button name and pop-up text.
4. The **Optional Hot Key** is optional. Type the hot keys you are assigning to the macro; for example, to use ALT+9 as the hot key, hold down the ALT key and the 9 key. The Optional Hot Key box displays Alt+9.

Important: Define hot keys carefully. SHIFT and a letter runs the macro every time it is typed. For example, using SHIFT+ g as your hot key, and then trying to type a company or contact name that begins with G in a new Contact record, the capital letter will not work. In other areas, such as the Contact Search Center, it runs the macro rather than searching for contacts beginning with capital G.

6. From the **Playback** drop-down list, select the playback speed for the macro. Select **Full Speed** to launch or run the macro quickly, or **Recorded Speed** to run the macro at the speed it was recorded.

Adding GoldMine User's Macros

Create macros to speed or ease workflow. Add other user's macros to you taskbar by:

1. Right-click on the GoldMine taskbar; select **Add New Item**. The **Taskbar Group Item Selection** dialog box appears.
2. Select **GoldMine Users' Macro** from the **Item Type** drop-down list.
3. Select the user who created the macro from the **User** drop-down list. Highlight the macro to add to the taskbar.
4. Browse to an icon file. The options display in the area below. Select an icon.
5. Click **OK** to add the item to the taskbar.

Resources

Creating Resources

1. Select **Tools>>Configure>>Company Resources**. The **Resources' Master File** appears.
2. Click **New**. The **Resources Profile** dialog box appears.
3. Type the **Resource Name** and **Profile**.
4. Type or select the **Code**.

- **Resource Name**

  The **Resource Name** is limited to eight characters.

- **Code**

  The **Code** is customizable and is a good way to group resources by type or location.

5. Select the **Custodian**, or leave as **(public)**.
6. Click **OK**.

Customizing Contact Records

Custom Screens and User-Defined Fields

User-Defined Fields vs. Details

The GoldMine administrator must decide what type of field (user-defined or detail) is most appropriate for the information being recorded.

When setting up a field as a Detail or user-defined field, consider:

- Details allow unlimited multiple entries without the need for the repetitive creation of fields and Lookup Tables.
- Unlike creating a new user-defined field, adding a new Detail does not allocate field space to every record in the database; therefore, less time is required to perform system maintenance.
- All Details are indexed for fast searching and browsing.
- User-defined fields can be updated using the Lookup.ini.
- User-defined fields can be date, numeric, or character and allow for complex filtering.
- Filters can be built on user-defined fields only.
- Groups can be built on Detail.

About Custom Fields and Screens

Apply several levels of customization to Contact records. When creating custom screens and fields, you have greater flexibility in the information stored in GoldMine.

Customize GoldMine by:

- Creating custom screens
- Creating custom fields
- Changing field labels
- Customized field typing

Custom Screens

Custom screens let you group related custom fields together. Create up to 20 custom screens, each with up to 250 fields. Custom screen information is stored in the Fields5 table.

Custom Fields

Custom fields, also called user-defined fields, make GoldMine an adaptable program, able to meet the needs of a broad range of businesses. Information about user-defined fields are stored in the Contact2, ContuDef, and Fields5 table.

(User-defined Fields vs. Details)

GoldMine on a Firebird database can store a maximum of 32k (SQL is 8k) for the combined length of user-defined fields in a record. GoldMine on an SQL database can store 1024 fields. For additional information, consult the knowledge base at support.frontrange.com.

The system administrator determines each field's type. Fields can store the following:

- **Character field type:** Alphanumeric data. A character field can also contain a dBASE expression that calculates field values or displays text.
- **Numeric field type:** Numeric data; required for the field to calculate values related to other numeric fields.
- **Date field type:** Contains dates.

When creating user-defined fields, plan your implementation: what is the field type, what data is going into the field, will it be a calculating field, and will it be associated with other fields in a custom screen? Are you on Firebird or SQL?

To create a field, select **Tools>>Configure>>Custom Fields**. The list of 10 user-defined fields and other user-defined fields appear. The mechanism is the same for creating one field as for creating many fields; it makes the repeated creation of fields easier by not returning to the screen designer after the one field is created.

Field Labels

Field properties determine the field's label in GoldMine. When changing labels on fields (whether primary fields or user-defined fields) you have a limit of 15 characters for the label. To change the label, right-click its name and select **Properties**. The **Field Properties** dialog box appears.

Field Typing

Use field typing to customize the look of field labels and values. The customization may include changing the label or data color in a field based on the value in that field or in another field, hide labels and values, assign a generic field use name to a field that may have different labels and values.

Customizing Primary Fields

Primary fields are in the upper pane of the Contact record. Many fields are indexed fields. You can modify the field labels and data display with colors or other expressions using the fields properties to create custom field typing.

Note: Whenever a form of DDE is used, the external application extracts data based on the hard-coded Field Name, irrespective of the Field Label.

Save different modifications to primary fields as primary fields views.

The Contact1 table stores primary field data.

1. Right-click on the field and select **Properties**. The **Field Properties** dialog box appears.
2. Modify field properties using the **Field Properties** dialog box.

Adding Fields to Screens

After creating fields and screens, place these types of fields on the screens:

- **Fields:** Hold data.
- **Expression fields:** Display titles, messages, or mathematical calculations based on other fields.

Use the **Screen Designer** to place the fields on screens. Only users with Master Rights can access the Screen Designer. The Screen Designer lets you click and drag fields in the display. Only unindexed fields can be dragged from the upper panes to the Fields tab area.

Important: If asked to rebuild the database, review Help topics regarding rebuilding and maintaining Firebird and SQL.

1. Select the **Fields** tab and right-click in the area under the tab. Select the screen to which you are adding the field. The selected custom screen becomes active under the Fields tab.
2. Right-click and select **Screen Design**. The **GoldMine Screen Designer** toolbar appears with a grid-like background in the Contact record.

Note: Changing the field order position of Company, Contact, Phone1, or any of the Key 1–5 fields can cause problems–especially with synchronization and querying the database.

3. Click **New** on the design toolbar. The **Place Field** dialog box appears.
4. From the **Field** drop-down list, select the field to place on the screen.

Note: Click **New Field** to create a new field without accessing **Tools>>Configure>>Custom Fields**.

5. Click **OK**. The field box appears in the upper left corner of the Fields tab. Drag and drop the field in the desired location on the Field Screen.

Note: When working with Row and Column entries, do not delete indexed fields from the primary Contact Record display or move indexed fields to custom user screens. Moving or deleting indexed fields can reduce GoldMine's ability to find records based on these fields when using search commands from the Lookup menu.

6. Double-click the field. The **Field Properties** dialog box appears.
7. Make changes to the Profile, Color, Layout, and Security tabs and click **OK**. The field is placed on the screen with an **n/a** in the data area.
8. Log out and back into GoldMine to see the field. Select to **File>>Exit** and then relaunch GoldMine.

Editing Field Properties

Field Properties determine the field type, label and data appearance, field location, label and data field size, and field security.

1. Right-click the field label and select **Properties**. The **Field Properties** dialog box appears.
2. Configure settings on these tabs:
   - **Profile:** Field label and field data options.

- **Color:** Colors displaying on the Contact record for the field label and field data.
- **Layout:** Field size, position, and tab order.
- **Security:** Fields requiring data, users having read and update rights to the field, and options to update the log on the History tab.

3. Click **OK** after configuring the Field Properties.

Adding Expression Fields to Screens

Use expressions to create titles or text messages on screen or to create calculated fields. Calculated fields have no value; they only display a value, so reporting or filtering cannot take place on the field. If filtering or reporting is required, create a field and use the Lookup.ini to calculate its value. The Lookup.ini returns a value.

1. Select the **Fields** tab and right-click in the area under the tab. Select the screen to which you are adding the field. The selected custom screen becomes active under the Fields tab.
2. Right-click and select **Screen Design**. The **GoldMine Screen Designer** toolbar appears with a grid-like background in the Contact record.
3. Click **New** on the design toolbar. The **Place Field** dialog box appears.
4. From the **Field** drop-down list; select **-- dBASE Expression --**.
5. Click **OK**. The field box appears in the upper left corner of the Fields tab. Drag and drop the field in the desired location on the Field Screen.
6. Double-click the field. The **Field Properties** dialog box appears.
7. In the **Field Label** area on the **Type** tab, select either:
   - **Global Label:** Designate the Global Label that applies to all databases. With Expression fields, the Local Label is not an option.
   - **Expression:** Type text in quotes or type a field expression.

Examples:

- To create a text expression label, type "Total:" in the Field Label area Expression box. GoldMine displays Total: as the field label
- To create a field expression label, type Contact1->Company in the Expression box. GoldMine displays the first 15 characters of the company name as the field label.

8. If you use Expression as a field label, type the **Label Reference** label for the expression field.

9. In the **Field Data** area, select **Expression** and type the expression that displays the field value.

Example: For two numeric fields, called USUM1 and USUM2, create a calculation expression to add them together. For example, Contact2->USUM1+Contact2->USUM2. Remember, you cannot report on the total value. If you create a complex expression, test it using the dBASE Expression Tester.

Adding Detail Records

Define a new **Detail** record to track basic information on topics meaningful to your business. Detail records add to the Detail Lookup list. Every Detail created also has its own Reference Lookup list.

1. Right-click under the **Details** tab and select **New**, or select **Contact>>Add a Detail**. The **Detail Properties** dialog box appears.

2. From the **Detail tab>>Detail** field, select a predefined value from the Detail F2 Lookup list.
3. In the **Reference** field, type or select a value from the Reference F2 Lookup.
4. If entering an e-mail address, select **Primary Address** for this address to be the default.
5. In the **Notes** field, type additional information (up to 64,000 characters). Notes are unique to each detail record.
6. Add further information by selecting the **Info** tab, or click **OK**.

Note: On the **Info** tab, update up to eight fields. Customize the field labels through the **Setup** tab. Each field can be controlled by the F2 Lookup, requiring users to input consistent information.

Creating Details Information Fields

Master rights users can customize 8 fields on the **Details** tab. The extended detail fields must be character-based, not numeric or date fields. If searched, they are searched as a character string. The seventh and eighth fields do not display on the user-defined Details tab.

Example: A company records the details of the type of cars customers drive. The information to record is make, model, engine size, color, number of doors, fuel type, and so on.

1. In the **Detail Properties** dialog box, select a detail to customize.
2. Select the **Setup** tab.
3. In each text box, type a field label to apply to each field.

Note: The number to the right of the text box is the fixed field length. Neither the format, order, nor length can be changed. Therefore, carefully consider, based on the length of the field, where to store each piece of information.

Tip: To use only a few of the fields, hide a field by typing at least two asterisks (**) rather than a name in the field label text box.

4. Use the **Tab Name** text box to convert this Detail into a separate tab. The new tab appears on the tab bar. Details entered on the new tab are recorded on the standard Details tab. Be careful when deleting details that have been converted into custom detail tabs.

Tips:

- Tab Name

  The Tab Name should not exceed six to eight characters, depending on the letters used, and should not contain any spaces.

- Shortcut Keys

  If you want to access the new tab with a shortcut key, type the tab name with an & before the letter you want to use. For example, type &Hobby if you want to use Ctrl+H as the shortcut keys.

- Tab Order

  GoldMine orders the tabs alphabetically. If you want to order tabs differently, place a number at the beginning of the tab name. The number does not appear on the tab, but determines the position of the title in the bank. For example, if you want the Hobbies tab to appear before the Automobile tab, type 1Hobbies in the Tab Name field.

- Deleting Custom Detail Tabs

5. Select **Save Tab column positions** to save modifications made to the new and the standard Details tab.
6. Click **OK**.

Creating F2 Lookup Entries

Before or after setting security options on the F2 Lookup tables, create entries for the table.

1. Right-click on the field to create lookup entries for. The **Field Lookup** dialog box appears.
2. Click **New**. The **F2 Entry** dialog box appears.
3. In the **Enter the F2 value** text box, type the new entry. Use a method to designate special handling of field values:
   - To place multiple entries in a field, with new entry after the existing entry, type a semi-colon (;) at the end of the entry. This appends the entry after existing data in the field, separated by a comma. This way, multiple entries can be placed in a field. When the entry does not end with a semi-colon, it overwrites data already appearing in the field.
   - To place a coded entry that has descriptive information in the lookup list, type two slashes (//) after the entry, then the description. The entry for the field it is treated like a comment, and displays the text in the field.

Example:

0001//Shops & Retail
0002//Shipping

Selecting one of these places the numeric option into the field. To require multiple and coded entry, place these in this order: code, semicolon, forward slashes, and description:

0001;//Shops & Retail
0002;//Shipping

- To add the results of a dBASE expression to a field, type a **~** followed by the expression. For example, ~dtoc(date()) in the F2 Lookup list enters the current date in the field.

4. Click **OK**. The entry adds to the F2 Lookup list.

HTML Displays in the GM+View Tab

About the GM+View Tab

Create a customizable information page using HTML capabilities. Display images, linked documents, or inserted GoldMine fields. Create several templates, set default templates, and then create rules controlling what template displays for contacts meeting the rules.

The tab uses Internet Explorer 6 or 7; the local menu and HTML design options are IE-based. Settings in the IE menu (View>>Text Size) control font size.

Information in the tab stores in the **Mailbox** table and synchronizes to remote users. Users with Master Rights can create or edit a template by selecting **Web>>Setup GM+View**. The **GM+View Tab Settings** dialog box appears.

Views on this tab are a key component of the record-typing used in the Record Type Administration Center. If record type rules are activated, right-click in the tab area and select another view; or, to reactivate the rules, right-click in the tab area and select **Rules-Based Selection**.

Record Ownership

About Record Ownership

Contact Records are owned by everyone (public), by a user, or by user groups. Ownership is used to determine security on Contact Records. Consider the following when setting record ownership:

- Records owned by (public) can be viewed and edited by all users.

Note: Viewing and editing security can be set on individual fields.

- Record Ownership is used when record curtaining is applied.

Note: Ownership is stored in the Owner field in the Contact1 table.

Ownership can be set when you:

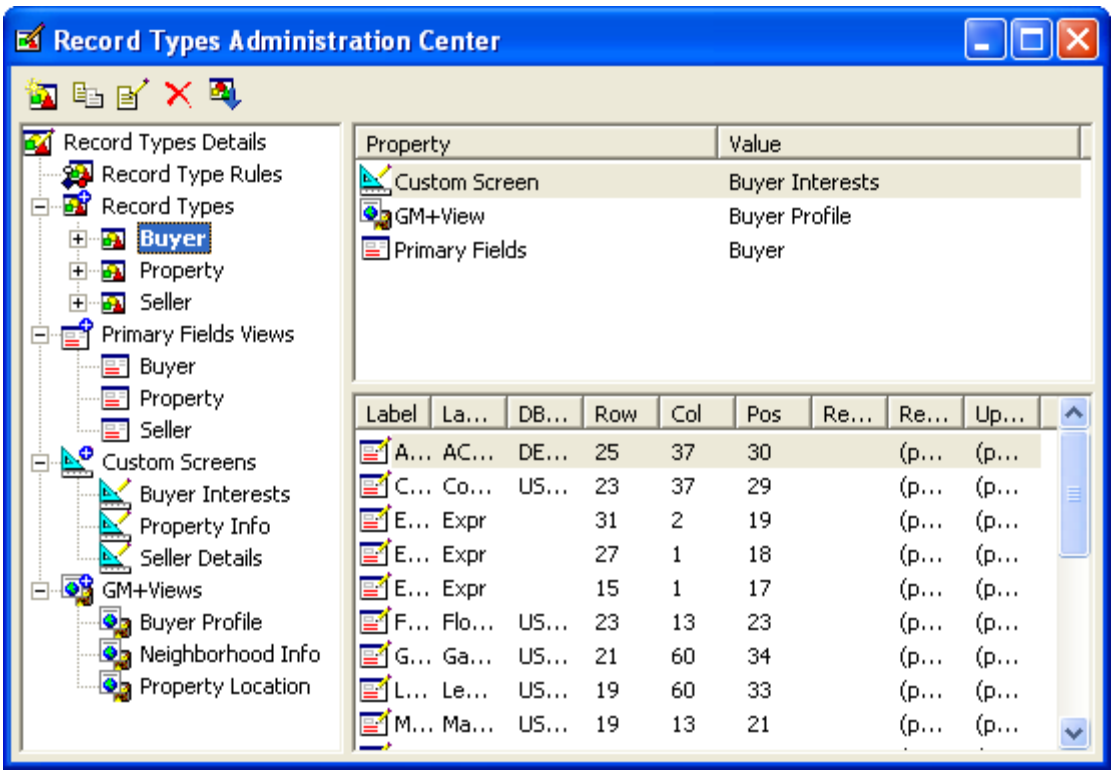
- Create a Contact Record
- Configure Record Ownership

Record Types Administration Center

Using the Record Types Administration Center

Use this Center to create and manage Contact Record customizations. Record typing is powerful and dynamic, letting you customize the type of Contact Record GoldMine users see and combine, within one database, what may appear to be disparate types of Contact Records.

To access the Record Types Administration Center, select **Tools>>Configure>>Record Types**. (View...)



Enhanced logic simplifies working with data records. Users can perform searches for record types instead of field names, enabling them to find information without identifying a field name. Logical pick lists display field names for the record type.

Use the Record Types Administration Center to create Record Types based on combinations of different Primary Field Views, Custom Screens, and GM+Views, and apply them in GoldMine based on your user-defined Record Type Rules. The full record type combination (Primary Field View, Custom Screens, and GM+View) is an "entity."

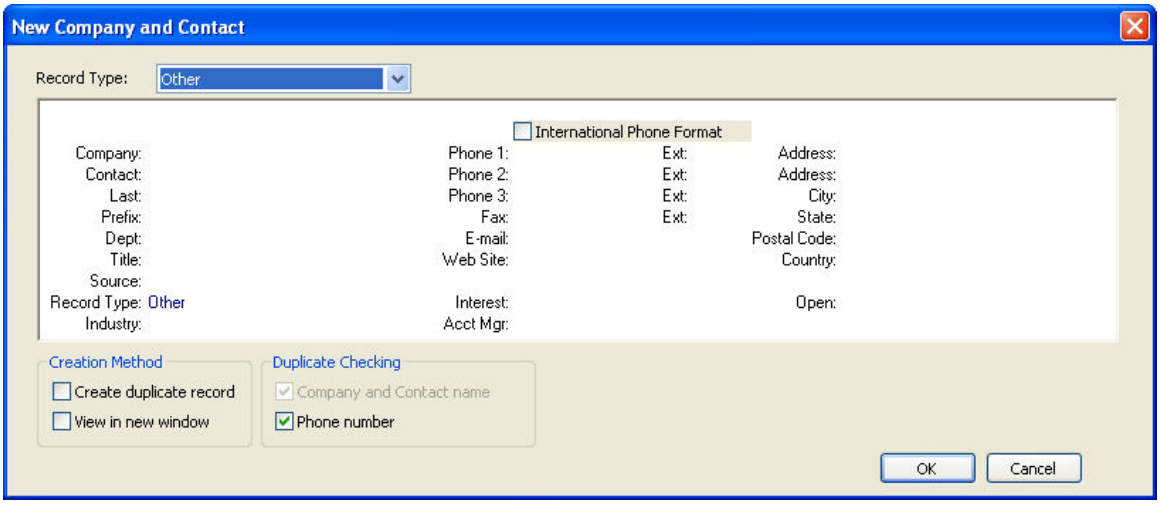
Examples:

- A manufacturing company uses GoldMine to track suppliers and customers. They use record typing to create a Supplier record type and a Customer record type.
- Realtors use GoldMine to maintain information about properties, sellers, buyers, and real estate financing sources. They use record typing to create customized record types for each category they work with.

Part of the Record Typing is determining New Record Creation Options to specify fields displayed to a user who is creating a record based on a record type. Available fields are limited to fields

included in the selected record type and are only available when the field value-based record type rules are activated.

Note: The New Record Creation Options, once configured, let you create new records based on record types. Select **File>>New>>New Default Record Type**. A customized dialog box appears.



Also create and apply Record Type Rules to govern what record type displays based on a field value-based or dBase expression-based rule, or to disable the rules. Rules can be as simple as when the value in the Acct. Type field is Property display the Property record type; when the value is Buyer, display the Buyer record type; or when the value is Seller, display the Seller Record type.

Opportunity/Project Managers Properties

Customizing the Opportunity and Project Managers Properties

Opportunity and Project share the same table, fields, and user-defined fields. Modify the field labels or reorder and hide tabs of an opportunity listed in the Manager.

1. Select **Go To>>Opportunities**, or click **Opportunities** on the Navigation Pane. The **Opportunity Manager** dialog box appears. (To customize Project Manager,select **Go To>>Projects**, or click **Projects** on the Navigation Pane).
2. Select a listed opportunity.
3. From the toolbar, click **Configure Opportunity/Project Manager** . The **Opportunity/Project Customization Properties** dialog box appears.
4. Click the **Fields** tab. Select from these options:
   - **New:** Create a new user-defined field on the Opportunity/Project Properties dialog box.
   - **Edit:** Edit a user-defined field.
   - **Delete:** Delete a user-defined field.
   - **Move Up:** Reposition the selected field above other fields.
   - **Move Down:** Reposition the selected field below other fields.
5. Click the **Labels** tab. Follow instructions on dialog box.
6. Click the **Tabs** tab. Select from these options:

- For each tab title listed, clear the associated checkbox to hide tab from view.
- **Move Up:** Reposition the selected tab above other tabs.
- **Move Down:** Reposition the selected tab below other tabs.
- **Reset:** Return the tabs to default order.

7. Click the **Options** tab. Select the checkbox to prompt users to choose whether they will create a new Project or Opportunity manually or using the appropriate wizard.
8. Click **OK**.
9. From the toolbar, click **Properties**. The **Opportunity/Project Properties** dialog box appears. Review your modifications.

Modifying and Creating Reports

About Reporting

GoldMine provides analysis reports for reviewing metrics. For example, calculate statistics based on activities scheduled and completed by GoldMine users.

Select from over 200 standard GoldMine reports or design a custom report tailored to meet your organization's needs. If using GoldMine with an E-license, you can use Answer Wizard reports.

A report can include data from these database tables:

- **Contact1:** Main area of the Contact Record and the Summary and Notes tabs.
- **Contact2:** Fields tab and user-defined fields.
- **ContSupp:** Contacts, Details, Referrals, and Links.
- **Cal:** Calendar and Pending tab.
- **ContHist:** History tab.
- **OpMgr:** Opportunity Manager.
- **Cases:** Service Center

Special fields can include:

- **Dialog:** Prompts users to input data used within the report.
- **Calculations:** Calculates the total or performs other mathematical operations.
- **Macros:** Places multiple fields in the report. Macros are like those used within GoldMine/Microsoft Word templates. For a list of available report Macros, see **GoldMine Report Macros**.

Creating Reports

Create GoldMine Reports from a blank template or clone the template closest to your desired results and edit it. Creating a report from a blank template is not recommended for beginners, but cloning reports and editing reports is.

1. Select **Go To>>Reports>>Report Center**. The **Reports Center** appears.
2. Click the **New Report** button or right-click inside the report name tree-view pane and select **New**. The **Report Properties** dialog box appears.
3. When creating a report, click the Profile tab:
   - **Report Description:** The name to display in the Report Center.
   - **Owner:** Select the report owner in the drop-down list.

- **Notes:** Type extra details about the report and report variables.
- **Report Filename:** Type or select the file name of the report template. The reports store in the Reports folder of the main GoldMine directory. Report templates should end with the extension .fp. For example, MyReport.fp.

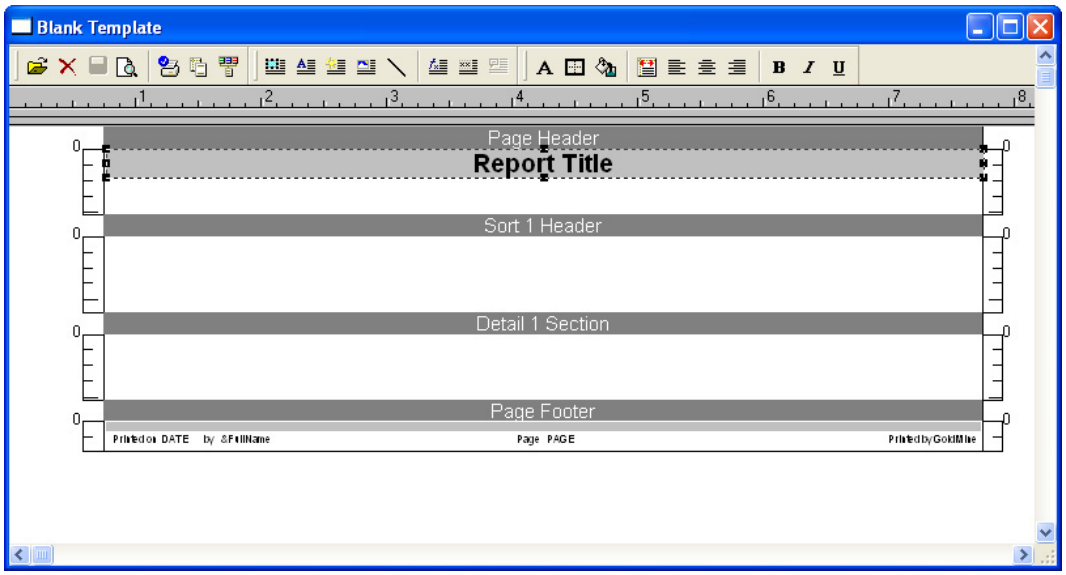
Important: If you do not give the report a unique file name at this stage of the process, it does not save.

- **Default Printer:** Select one:

- **Selected Printer:** The device designated in the Output to section of the Reports Menu
- **Layout Printer:** The special printer selected in GoldMine's layout mode

4. Click **OK** on the **Profile** tab to return to the **Reports Center**. The new report is now listed in the report list.

5. Highlight the new report and click the **Layout** button or right-click and select **Layout**. A blank template appears.



6. Use the **Report Layout** local menu and the **Layout** toolbar to format your GoldMine Report. See Editing Reports.

Cloning Reports

Identifying an existing report that is closest to meeting your needs and then cloning it is the most efficient way to create new GoldMine reports. We recommend you clone existing reports before modifying them so you always have a clean copy available for future edits.

1. Select **Go To>>Reports>>Report Center**. The **Reports Center** appears.
2. Select the user whose report you are cloning in the **User** drop-down list. Select **(public)** if the report is publicly owned.
3. Select the report to clone and click the **Clone Report** button or right-click the report name tree-view pane and select **Clone**. The **Report Properties** dialog box appears.

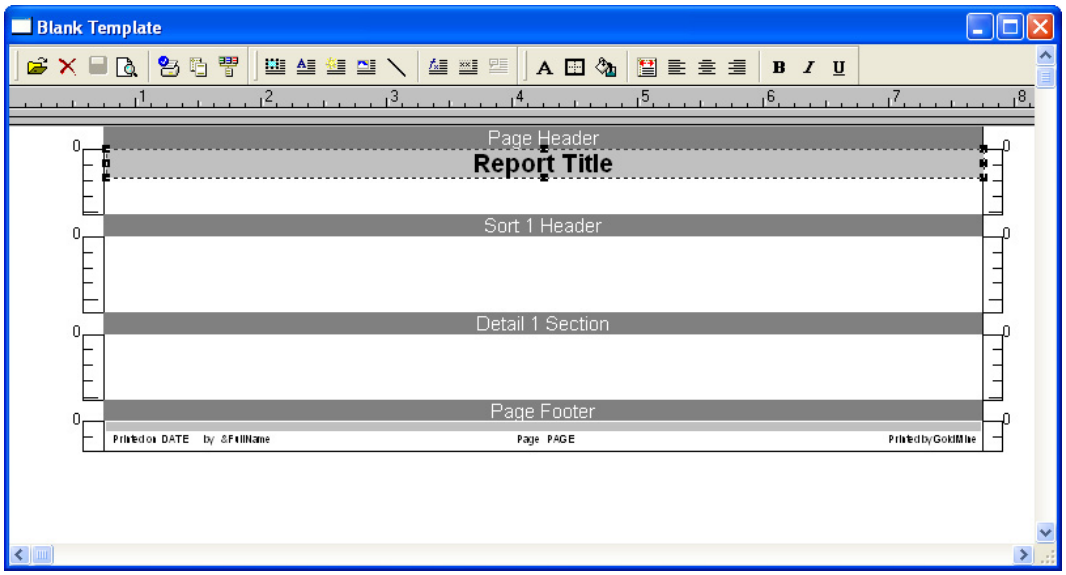
4. Select the Profile tab and configure:
   - **Report Description:** When cloning a report, the description defaults to Copy of <report name>. Type a new and unique name for the report to replace the default.
   - **Owner:** Select the report owner in the drop-down list.
   - **Notes:** Type extra details about the report and the report variables.
   - **Report Filename:** Type a new, unique name for the report template. Reports store in the Reports folder of the main GoldMine directory. Report templates should end with the extension .fp.

Important: If you do not give the report a unique file name at this stage of the process, it does not save.

- **Default Printer:** Select one:
  - **Selected Printer:** The device designated in the Output to section of the Reports Menu
  - **Layout Printer:** The special printer selected in GoldMine's layout mode.

5. Click **OK** on the **Profile** tab to return to the **Reports Center**. The new report is now listed in the report list.

6. Highlight the new report and click the **Layout** button or right-click and select **Layout**. The report layout appears.



7. Use the **Report Layout** local menu and **Layout** toolbar to format your GoldMine Report. See Editing Reports in the online Help.

Report Formatting

About Report Filters

Report filters determine what information to include when the report is run. Report filters are composed with the same notation as other filters in GoldMine.

There are three ways filters can be applied to reports:

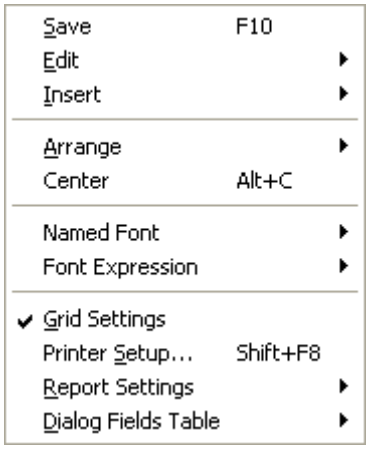
- Active GoldMine filters or groups
- Global Report filters
- Section filters

GoldMine filters and Global filters to determine which Contact Records are included in a report. Section filters specify what information is in the section the filter applies to. Different sections of reports can have different filters, including macro filters.

Inserting Report Fields

Insert several types of fields into a GoldMine report. After inserting, edit the fields.

1. Right-click on the report template. The layout local menu appears.



2. Select **Insert**. Insert these types of fields:
   - **Label:** A text field to act as a field label.
   - **Section:** A section in the report.
   - **Data Field:** A macro field or a field from the database.
   - **Expression Field:** A calculation field in the report.
   - **System Field:** A predefined system field, such as a record count.
   - **Dialog Field:** An interactive field in the report that requires a response from the user.
   - **Line:** A line into the report.
   - **Picture from Clipboard:** The .bmp that is in the clipboard.
   - **Picture from Disk File:** A .bmp from a saved location.

Inserting System Fields in Reports

1. Right-click the report template and select **Insert>>System Field**. The **System Field Selection** dialog box appears.
2. Select the field to insert.
3. Click **OK**. The field appears as a movable box in the report template. Drag the box to the desired location and left-click to place it. System Fields are usually placed in the report Header or Footer.

Inserting Sections in Reports

1. Right-click the report template and select **Insert>>Section**. The **New Section** window appears. The window displays sections available for inclusion. Detail and Sort sections are numbered from 1 to 9 and are only available for inclusion in numeric order.
2. Select the section to insert in the **Section Name** area.
3. Click **OK**.
4. Edit sections after inserting them.

Inserting Data Fields in Reports

1. Right-click on the report template and select **Insert>>Data Field**. The **Select a Field** dialog box appears.
2. From the **Database Name** drop-down list, select one:
    - **Macros:** Composite fields similar to those used when setting up a GoldMine/Word template. These fields include blank line suppression.
    - **Contact1:** A list of available fields from the Contact1 database showing fields from the primary contact area of GoldMine.

- **Contact2:** A list of available fields from the Contact2 database including information from the Summary tab and all user-defined fields.
- **ContHist:** Information available from the ContHist table containing details shown on the History tab of a Contact Record.
- **ContSupp:** Information available from the ContSupp table holding the contents of the Contacts, Details, Referrals, and Links tabs.
- **Cal:** Information available from the Cal table containing the calendar details shown on the Pending tab.
- **OpMgr:** Fields available from the Opportunity Manager database OpMgr.
- **OpMgrFld:** Additional fields available from the Opportunity Manager database applicable to New Opportunity templates.

3. After selecting a table, select the field from the **Field Name** drop-down list. Fields available in the Field Name list are determined by the selected Database Name.
4. Click **OK**. The field appears as a movable box in the report template. Use the mouse to drag the box to the desired location and left-click to place it.
5. Double-click the field to edit Field Properties.

Inserting Dialog Fields in Reports

Create Dialog Fields before inserting them into your report.

1. Right-click the report template and select **Insert>>Dialog Field**. The **Select Dialog Field** dialog box appears.
2. Select the field to insert.
3. Click **OK**. The field appears as a movable box in the report template. Use the mouse to drag the box to the desired location and left-click to place it.
4. Double-click the field box to change the parameters. For instance, change the True and False indicators on a Logical dialog box.

Inserting Expression Fields in Reports

Use expression fields to insert calculations in reports. Expressions can perform mathematical functions or derive statistical information from numeric fields, such as averages, percentages, or the number of days between two dates. Calculation fields are usually found in analysis and calendar reports, but they can be added to any type of report.

1. Right-click a report template and select **Insert>>Expression Field**. The **Enter Field Name** dialog box appears.
2. Type a descriptive name for the field. Do not use spaces.
3. Click **OK**. The **CALC->FieldName** expression dialog box appears.
4. In the **Expression** text box, type the calculation expression, including the tables you are drawing from. For example, Contact2->Usum1+Contact2->Usum2 adds the sum of Usum1 and Usum2 to the report.

   Use the buttons to add expression elements:
   - **System Field:** Inserts a system field in the expression.
   - **Dialog Field:** Inserts a dialog field in the expression.
   - **Data Field:** Launches the **Select a Field** dialog box to select a field or macro to insert in the expression.
   - **Operator:** Launches the **Select an Operator** dialog box to select an operator such as <, >, =, .AND., etc.
   - **Function:** Launches the **Select a Function** dialog box. Select a predefined arguments that returns a predefined type value.
   - **Calc Field:** Inserts a predefined calculation field in the expression.

5. Click **OK**.

Inserting Labels in Reports

1. Right-click the report template and select **Insert>>Label**. An edit box appears. Drag the edit box to the desired location and click to place.
2. The box shows the word "Label." Double-click the label box and the **Text Field Parameters** dialog box appears.

Note: Labels appear on the report regardless of whether the field contains data.

3. In the **Text** text box, type the words to appear in the label.
4. In the **Text Position** area, select the **Horizontal** and **Vertical** placement of the text within the label box.
5. Click **Outline** to create an outline of the text field and set the Line Properties.
6. Click **Background** to create a background color and type within the label box.
7. Click **Font** to select the text font.
8. Click **OK** to save and close the text parameters.

Inserting Lines in Reports

Lines provide structure to your report.

1. Right-click on the report template and select **Insert>>Line**. A field square appears; drag it to the desired location and click to place.
2. The line appears in your report with editing tabs on the box. Drag the editing tabs until the line is the desired length.
3. Double-click on the line to open the **Line Style and Color** dialog box.
4. In the **Line Angle** area, select the direction for the line to run.
5. In the **Line Style** area, select the style of line.
6. Type the **Line Width** in millimeters.
7. Click **Line Color** to open a **Color** dialog box. Select a line color.
8. Click **Outline** to open the **Line Properties** dialog box, controlling lines around the line field box (not the line itself).

9. Click **Background** to create a background color.
10. Click **OK** to save and close.

Inserting Pictures in Reports

Insert .bmp graphics (from the clipboard or a saved file) into GoldMine Reports.

1. Right-click the report templates and select **Insert>>Picture from Clipboard** for a .bmp file on the clipboard; or **Picture from Disk File** to browse to a stored .bmp file.
2. A data box appears on the template. Drag the box to the desired location and click to place the picture.
3. To add an outline to the picture, click the picture to display the editing box around it; then right-click on the picture and select **Edit>>Outlines**. The **Line Properties** dialog box appears.

Editing Report Parameters

Set report margins, rulers, date format, and print defaults with the report parameters.

1. Right-click on the report template and select **Report Settings>>Options**. The **Report Parameters** dialog box appears.
2. In the **Margins** area, type the **Left**, **Right**, **Top**, and **Bottom** margins in inches.
3. In the **Ruler Selection** area, determine if a ruler displays and whether it appears in inches or centimeters:
   - **Hide:** No ruler displays on the template window.
   - **Inches:** Each section displays a ruler calibrated in inches.
   - **Centimeters:** Each section displays a ruler calibrated in centimeters.

4. In the **Default Date Format** area, select **MM/DD/YY** to display dates as month/day/year, or **DD/MM/YY** to display day/month/year.
5. Select **Print trial records when output to printer** prior to running a report. Use this option to run a test printing and adjust paper feed through the printer before sending the records.
6. Select **Print report header before the page header** to print report headers added before printing the page header.
7. Click **OK**.

Editing Report Layouts

The reports layout window displays a report's existing labels, fields, and sections for editing. Edit the report parameters, pages, filters, and break fields. Within the report layout, add, remove, or change parts of the report.

Tip: Before changing standard GoldMine reports, clone the report to preserve original settings.

To edit a field, label, or section, right-click on it and select **Edit**. Available options depend on the type of item you are editing.

Tip: When editing, the default report layout displays XXXX instead of field names. To display the field names and facilitate editing, right-click and select **Edit>>Show Field Names**. The fields names display in the layout window.

To quickly edit Reports, use the GoldMine Reports Shortcut Keys and the Layout local menu or the Layout toolbar.

Customize the GoldMine Reports by:

- **Cloning a Template**
- **Creating a New Template**

Refine the reports by:

- **Editing Report Parameters**
- **Editing Report Pages**
- **Inserting Sections**

- **Inserting Fields**
- **Editing Fields**

These settings also determine the information and the order it displays in the report:

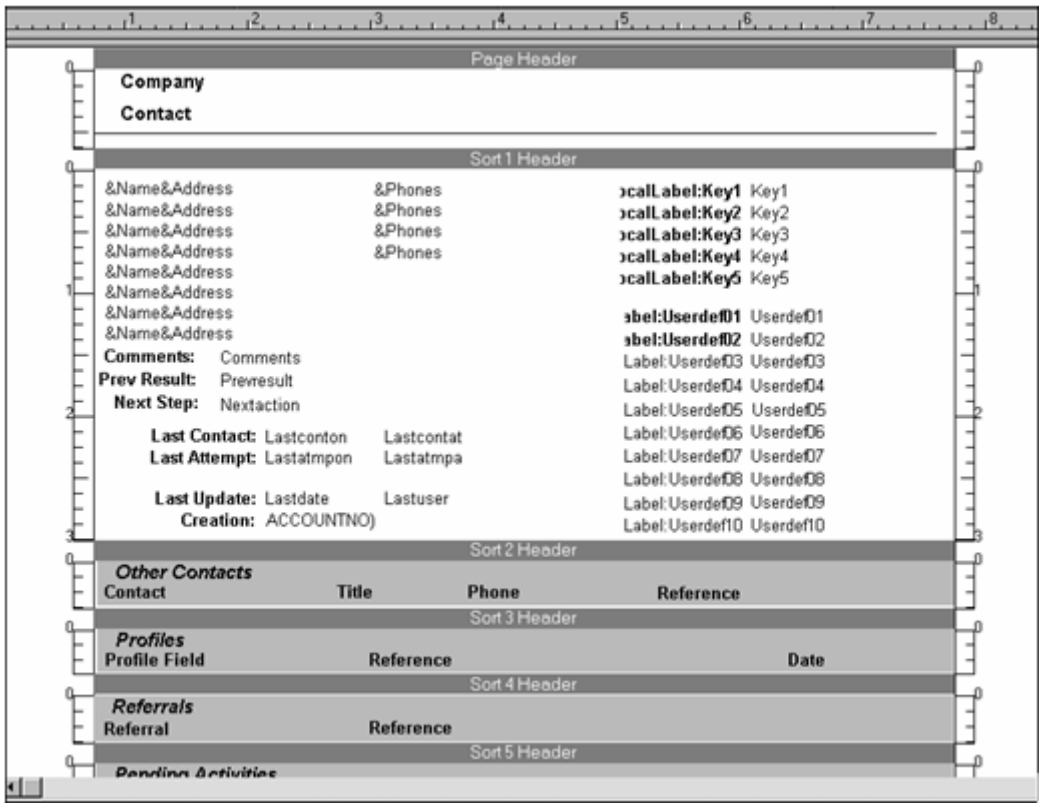
- **Filters:** Determines the information included in the report; apply filters on a global level or to a report section.
- **Break Fields:** Manages the grouping of report information.

Editing Report Sections

Example of Formatting Sections

The Contact Profile (Detailed) report example shows report template divided into 17 sections, each one holding different information. By default, the information displays as rows of Xs, plain text labels, and dates.

To display the field names instead of the Xs, right-click and select **Edit>>Show Field Names**.



- **Page Header:** Company and Contact Name fields from the Contact1 database. Also displays a line dividing the header from following sections.
- **Sort 1 Header:** Contact name, address details, and telephone numbers as macros. It also displays the five key fields and the first 10 user-defined fields along with the local label names. The final information shown is that drawn from the Summary tab.
- **Sort 2 Header:** Title bar information for displaying additional contacts within the report. If additional contacts exist, this section defines where they are displayed.
- **Sort 3 Header:** Sort 2 Header, but displays Details.
- **Sort 4 Header:** Sort 2 Header, but displays Referrals.
- **Sort 5 Header:** Sort 2 Header, but displays Pending Activities.
- **Sort 6 Header:** Sort 2 Header, but displays History Activities.
- **Sort 7 Header:** Sort 2 Header, but displays Linked Documents.
- **Detail 1 Section:** Information defined in Sort 2 Header listing all additional contacts.
- **Detail 2 Section:** Information defined in Sort 3 Header listing all profiles.
- **Detail 3 Section:** Information defined in Sort 4 Header listing all referrals.
- **Detail 4 Section:** Information defined in Sort 5 Header listing all pending calendar activities.
- **Detail 5 Section:** Information defined in Sort 6 Header listing completed history activities.
- **Detail 6 Section:** Information defined in Sort 7 Header listing all linked documents.
- **Sort 1 Footer:** Section for notes from the Notes tab. With no criteria for determining whether notes exist, this section prints in every report.
- **Page Footer:** System information such as the date the report was printed, by which user, and the page number.

When running this report, the page header and footer and Sort 1 Header and Footer have no filter and therefore always display. The other sections use filters. If the data for the section exists, the section displays in the report.

Title bars for the optional sections display in sort headers while the actual information displays in detail sections.

1. Click on the header, detail, or footer section. An editing box appears around the section.
2. Right-click and select **Edit**:

- **Delete:** Deletes the section.

- **Outlines:** Accesses the **Line Properties** dialog box. Select lines that outline the section. Also select the line size and color.
- **Background:** Accesses the **Item Background** dialog box. Select the color and type of section background.
- **Filter:** Accesses the **Section Selection Criteria** dialog box. Create a filter to specify section contents.
- **Show Field Names:** Toggles the template display from XXXX to field names.

3. To edit using the **Sort # Header** or **Detail # Section** dialog boxes, double-click the section title. Select from:
    - **Compress Space Before the First Item:** Compresses space between the beginning of the section and the object at the top of the section.
    - **Compress Space After the Last Item:** Removes space after the last object of the section to allow for large word-wrapped fields.
    - **Advance Page Before Printing the Section:** Advances to the next page before the beginning of the section.
    - **Advance Page After Printing the Section:** Advances to the next page after printing the section.
    - **Reprint Titles on Every Page:** Prints titles on every page (available for sort sections only).
    - **Number of Records Across the Page:** Specifies the number of records that can be placed across the report template. This option is useful for printing labels and is available for Detail Sections only.
    - **Filter:** Accesses the **Section Selection Criteria** dialog box. Create a filter to specify section contents.

- **Outlines:** Accesses the **Line Properties** dialog box. Select the lines that outline the section. Select the line size and color.
- **Break Field:** Accesses the **Break Field for Section** dialog box. Edit a break field to manage the grouping of multiple entries (available for Sort Header sections).
- **Background:** Accesses the **Item Background** dialog box. Select the color and type of section background.

Editing Break Fields in Reports

1. Double-click the **Sort Header** section title. The **Sort # Header** dialog box appears.
2. Click **Break Fields**. The **Break Field Section** dialog box appears.
3. Click **Data Field**; the **Select a Field** dialog box appears. You can construct a simple break field. For example, Contact1->AccountNo (see About Report Break Fields) and can also use macros for break fields, for example, &Sort2&Suppfile="csp" to define the break field for Sort 2 Header. See the &Suppfile Chart.

    &Suppfile Chart:

    TABLE **CHARACTERS 1 AND 2** **CHARACTER 3**

Calendar -- ca	&suppfile="ca*x*"	Where *x* = a : appointment c : call back t : next action d : to-dos m : E-mail s : forecasted sale o : other action
ContSupp -- cs	&suppfile="cs*x*"	Where *x* = c : additional contacts p : details r : referrals l : linked documents o : organizational chart
ContHist -- ch	&suppfile="ch*x*"	Where *x* = a : appointment c : call t : next action d : to-dos m : message s : completed sale o : other action

Note: Generally, only data fields from the database file specified by the macro are used within that section of the report.

Example of Break Fields in a Report:

Select the contact report Contact Profile (Detailed) and display the layout. By double-clicking each section title in turn and clicking the Break Field button, it is possible to see the break field of each section.

Many of these sections cannot utilize a break field; others use the &suppfile macro.

- **Page Header:** No break field available.
- **Sort 1 Header:** Contact1 and contact2 information. Break field: Contact1->AccountNo. This is the primary break field—it groups together all information for one Contact record on a report before moving onto a report for the next Contact record.
- **Sort 2 Header:** Labels and header information—no data fields. Break field: &sort2&suppfile=”csc”. This break field first groups together everything alphabetically according to the contents of the &sort2 field and then groups together all additional contacts for the current Contact record.
- **Sort 3 Header:** Labels and header information—no data fields. Break field: &sort3&suppfile=”csp”. This break field first groups together everything alphabetically according to the contents of the &sort3 field and then groups together all details for the current Contact record.

- **Sort 4 Header:** Labels and header information—no data fields. Break field: &sort4&suppfile="csr". This break field first groups together everything alphabetically according to the contents of the &sort4 field even though this is not defined and then groups together all referrals for the current Contact record.
- **Sort 5 Header:** Labels and header information—no data fields. Break field: &sort5&suppfile="ca". This break field first groups together everything alphabetically according to the contents of the &sort5 field even though this is not defined and then groups together all scheduled activities for the current Contact record.
- **Sort 6 Header:** Labels and header information—no data fields. Break field: &sort6&suppfile="ch". This break field first groups together everything alphabetically according to the contents of the &sort6 field even though this is not defined, and then groups together all completed activities for the current Contact record.
- **Sort 7 Header:** Labels and header information—no data fields. Break field: &sort7&suppfile="csl". This break field first groups together everything alphabetically according to the contents of the &sort7 field even though this is not defined and then groups together all linked documents for the current Contact record.
- **Detail 1-6 Section:** No break fields available.
- **Sort 1 Footer:** No break field available.
- **Page Footer:** No break field available.

If break fields did not appear in the sort headers for multiple information sections, only the first piece of information for that category would be included. Multiple instances of the same type of information such as details would be omitted, as the report would move to the next section and/or Contact record.

4. Click **Calculation Field** and the **Comp_*XXX*** dialog box appears. A section break field can be a calculated field that lets you generate complex sort breaks. The expression dialog box contains these options:

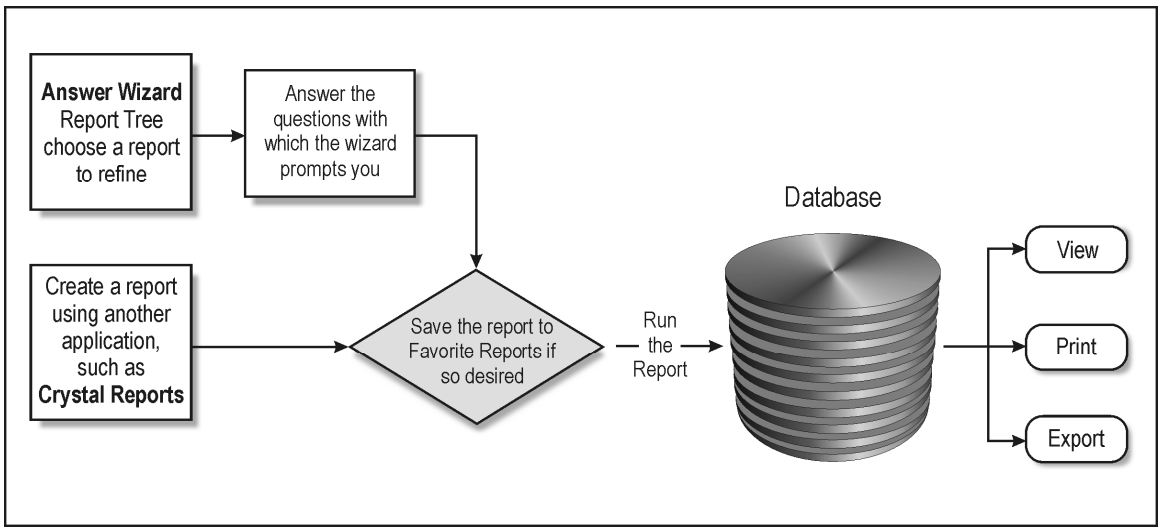
- **System Field:** Inserts a system field in the expression.
- **Dialog Field:** Inserts a dialog field in the expression.
- **Data Field:** Launches the **Select a Field** dialog box where you select a field or macro to insert in the expression.
- **Operator:** Launches the **Select an Operator** dialog box where you select an operator such as <, >, =, .AND., etc.
- **Function:** Launches the **Select a Function** dialog box. Select a predefined argument that return sa value of a predefined type.
- **Calc Field:** Inserts a predefined calculation field in the expression.

Answer Wizard Reports

About Answer Wizard Reports

Important: Information about using the Console is available from the Help menu in the application.

Answer Wizard is a reporting tool letting users run detailed reports about company issues and trends. When selecting a report from the Answer Wizard tree, the wizard prompts you to answer questions related to the output of your report, such as content parameters and printing options. Answer Wizard may prompt you to answer report-specific questions, such as date and time ranges, priorities, and so on. The wizard then runs these specifications against information in your database and returns the results.



If using GoldMine with a SQL database, Answer Wizard reports provide a quicker way to produce reports based on GoldMine data. Select from a variety of predefined Answer Wizard reports. The Answer Wizard is installed when you select Management Intelligence during a custom installation of GoldMine using an E-license.

Note: Also install Crystal Reports and create your own reports. The Crystal Reports installation file is on your GoldMine Premium Edition CD-ROM.

The Answer Wizard provides independent online Help for configuring and using it.

Select from these report categories:

- Account/Contact Information
- Personal and Team Calendars
- Past Activities
- Sales Analysis
- Other Analysis

Note: In a network environment, Answer Wizard must be installed locally (on the computer of those individuals using the reports).

To launch the Answer Wizard, click **Start** on the Window taskbar and select **Programs>>GoldMine>>Answer Wizard**.

Using Answer Wizard

Important: Information about using the Console is available from the Help menu in the application.

1. Click **Start** on the Windows taskbar and select **Programs>>GoldMine>>Answer Wizard**. The **Answer Wizard** appears.
2. If necessary, click **Preferences** to configure database settings and login information.
3. Expand the tree and select the report you are running. Click **Next** to work through the wizard.

Configuring the Telemarketing Tools

About Telemarketing Scripts

Using GoldMine's branching scripts, a user can gather information by working through a series of interactive questions. Branching scripts organize questions in a flowchart-type format.

Use scripts to automate a variety of tasks such as guiding telemarketers through sales calls, collecting survey information, and training new salespeople.

Branching scripts are GoldMine's version of online questionnaires. With a branching script, telemarketers can deliver structured information to a prospect and, based on the prospect's response, work through a predefined dialog of related information.

Additional information can be designed to answer the customer's anticipated inquiries or provide requested information, so an accurate response to the customer's needs is readily available.

Each script question can contain an unlimited number of possible answers, and each answer can branch out to a different question. A script can contain up to 99 questions.

While the script is being executed, information on the prospect's responses can be saved in the Notes field of the active contact record or placed directly into one of the fields of the contact's record. Once this data is entered, filter expressions can be used to select contacts who responded similarly to script questions.

Getting Started

Before attempting to enter a branching script in GoldMine, map the entire script structure on paper. This strategy can be helpful in creating a branching script:

1. Decide what questions to ask and the possible responses. List questions with all the related responses directly below them. Draw lines connecting each response to the appropriate follow-up question. Note each question can have several response lines leading to it. However, no response should have more than one line leading from it (each response can only branch to one question).
2. Number each question. Try to select a numbering scheme that keeps questions in a natural sequence. If there are sub-branches within the script, you will have to jump numbers. A good rule to follow is to number the questions in a way that no answer leads to a lower-valued question. Number questions in intervals of 5 or 10 so additional questions can be inserted later in the script without having to change the numbering scheme.
3. When all the questions are numbered, follow each question back to the preceding answer, and enter the question number next to the response. These numbers are the Goto values entered into GoldMine.
4. Determine if any questions should be omitted from the dialog. Mark them on the worksheet.
5. To store the text of a selected response in a field, enter the name of the field to be used next to the question number on the worksheet. Most fields in the contact record can be used to store script responses.

Now you are ready to enter the script in GoldMine.

Telemarketing Scripts

Creating Telemarketing Scripts

1. Select **Go To>>Sales Scripts**. The **Telemarketing Script** dialog box appears.
2. Click **Maintain Scripts**. The **Branching Scripts Listing** dialog box appears.

Using Telemarketing Scripts

Use telemarketing scripts to construct structured dialogs with customers.

1. Select **Go To>>Sales Scripts**. The **Telemarketing Script** dialog box appears.

> **Note:** All the responses you log while using the script are applied to the current Contact Record.

2. Select the script in the **Script** drop-down list and begin asking questions. Update fields as needed.

Phone Dialer

Calling Contacts with GoldMine

With the **Telephony** tab settings properly configured, use GoldMine to dial telephone numbers.

Calling Primary Contacts

To call primary contacts, select **Actions>>Call Contact** and then select from:

- **Dial Phone 1**, **Phone 2**, and **Phone 3:** Dials the selected phone number from the primary Contact Record. The Phone Dialer dialog box appears.
- **Dial Fax:** Dials the fax number.
- **Redial the Last Number:** Dials the last number called. The Phone Dialer dialog box appears.
- **Manual dial:** Starts the timer.
- **Incoming Call:** Starts the timer.

Calling Additional Contacts

To call an additional contact, right-click the **Contacts** tab and select **Options>>Dial**. The Phone Dialer dialog box appears.

Calling Personal Contacts

To call a contact in your personal contacts, select **Go To>>My Contacts**. Click **Dial**. The Phone Dialer dialog box appears.

Setting Preferences for the Telephony Tab

Configure special modem and dialing settings to use with GoldMine's auto-dialer feature. You must have a TAPI modem locally installed and working on your computer before you can successfully configure the modem settings.

1. Select **Tools>>Options**. The **User's Preferences** dialog box appears.
2. Select **Telephony**.
3. In the **Modem Settings** area, configure these settings:

- **TAPI Line:** Select the TAPI settings in the drop-down list that match your computer's Phone Dialer TAPI settings.
- **Dialing Properties:** Displays the **Phone And Modem Options** dialog box.
- **Line Properties:** Displays the modem **Connection Preferences** dialog box.

Note: Consult your Windows and modem documentation for configuration details.

4. In the **Dial Number Formatting** area, configure:

- **Let TAPI format phone numbers:** Allows TAPI to add numbers required for dialing a phone number such as international access and country codes.
- **Dial numbers as entered:** Dials the numbers as they are formatted in GoldMine.
- **Local Area Code:** The area code you are dialing from.
- **Dial Prefix:** A number sequence accessing a special line or service.
- **Dial Suffix:** A number sequence after the telephone number to access a special line or service.

- **Hang up after: x sec.:** Specifies the number of seconds before GoldMine tries to reconnect.

5. In the **SoftPhone** area, enter the local extension number and set SoftPhone as the default. Click the **SIP Settings** button to access the **SoftPhone/SIP Settings** window to change your settings.
6. Click **OK** to save the settings and close the dialog box.

Auto-dialer Settings

Customizing Auto-dialer Settings

With the advent of multiple area codes in metropolitan areas and telephone dialing capabilities in computers, GoldMine developed a method for differentiating between local and long distance calls, letting GoldMine users dial the phone using the modem in a computer without entering special dialing codes.

A user-created, configuration settings file called **predial.ini** that is placed in the GoldMine folder handles the differentiation between local and long-distance calls. The file consists of four sections: **[City]**, **[Prefix]**, **[Suffix]**, and **[PBX]**. Each section is scanned in the listed order until a match is found. This terminates the search, and GoldMine uses the values found to dial the phone ignoring settings in lower sections of the **predial.ini**. The exception is the **[Suffix]** section; GoldMine checks this section for a match, thus terminating the search when a match is found.

Set auto-dialer to recognize differing telephone number types, prefixes, and suffixes by creating an **Exception List** in a **predial.ini** file. An exception list provides a set of conditions GoldMine checks when processing telephone numbers formatted for North America. For example, you may

need to set up your auto-dialer to recognize different types of telephone numbers, such as local and long distance. Upon finding a match to specified conditions, GoldMine processes telephone numbers according to the formatting entered for the condition.

Note: See Technical Document 387, "Using and Setting up GoldMine's PREDIAL.INI for Special Dialing Needs" at **support.frontrange.com**.

Creating Automated Processes

About Automated Processes

Automate routine tasks by setting up a series of predefined actions to perform on contacts in the database including:

- Administrative and tracking duties
- Generating direct mail
- Validating data

Example: Print introductory letters to new contacts whenever a Contact Record is created. After printing the letter, the Automated Process can schedule a follow-up activity (such as a call back) on the calendar or a GoldMine user.

Designing Automated Processes

Automated process components:

- **Tracks:** A sequence of two or more events used as the step-by-step instructions GoldMine evaluates to perform a defined series of activities. Also known as an Automated Process. Link several events to form a track.
- **Events:** Step-by-step instructions contained in an Automated Process, or track, GoldMine evaluates to perform a series of activities. An event consists of a trigger and an action. An Automated Process consists of a sequence of one or more events.

Events within each track perform an action when triggered by a condition.

Use the **Automated Processes Center** to create and edit tracks and events and to execute tracks.

Manage tracks attached to contacts on each record with the **Tracks** tab.

Use menu options available when selecting **Tools>>Automated Processes** to Execute Processes and Manage Processes.

Designing Automated Processes

Before creating Automated Processes, draw the idea for the process, then use the Automated Process Wizard to create it.

Preemptive and Sequential Events

When each event is created, it is assigned a preemptive or sequential number. GoldMine evaluates preemptive events first and then sequential events.

When creating preemptive events you generally set the condition to eliminate the scanned record rather than confirm this process is appropriate. For example, a sales rep and territory is designated in the Sales Rep and Territory fields, then remove this track from the record; otherwise populate these two fields with the defined criteria.

Preemptive events are numbered from 0 to 99. GoldMine processes all of the preemptive events of a track first before moving on to sequential events. If the Preemptive event “if” statements is:

- **True:** Perform the action and go to the next event.
- **False:** Do not perform the action but still go to the next event.

Preemptive events should be numbered 5, 10, 15, and so on. Keep space between the events to insert additional events.

Sequential events perform actions such as printing a letter, sending an e-mail, or scheduling a call. They are numbered from 100 to 999. Sequential events should be numbered 100, 110, 120, and so on to add other events between existing events.

After completing all preemptive events, GoldMine runs the first sequential event and processes sequential events. If the statement is:

- **True:** Perform the action and go to the next sequential event.
- **False:** Do not perform the action and do not proceed to the next sequential event.

Once GoldMine completes the sequential events, it processes the next track for the Contact Record, or if there is no track to process, GoldMine goes to the next Contact Record.

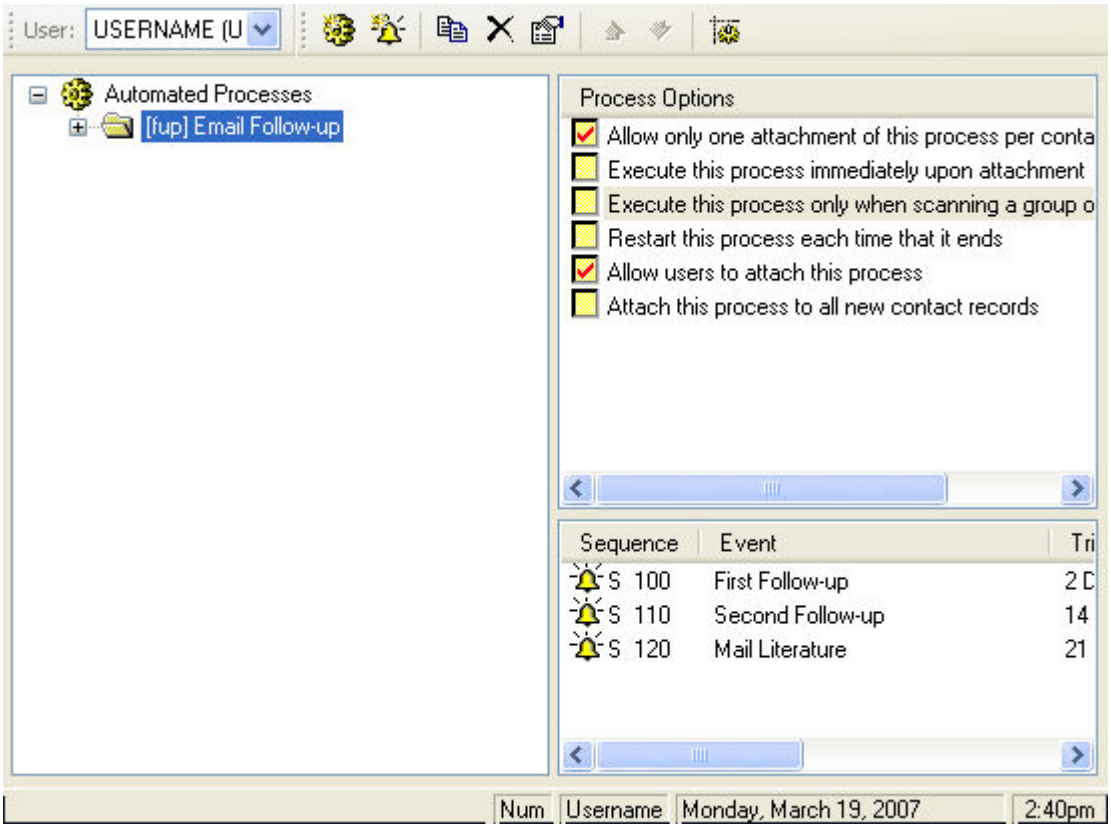
When creating an Automated Process, define the track, then allocate the events, triggers, and actions to the track.

Example of the planning to do:

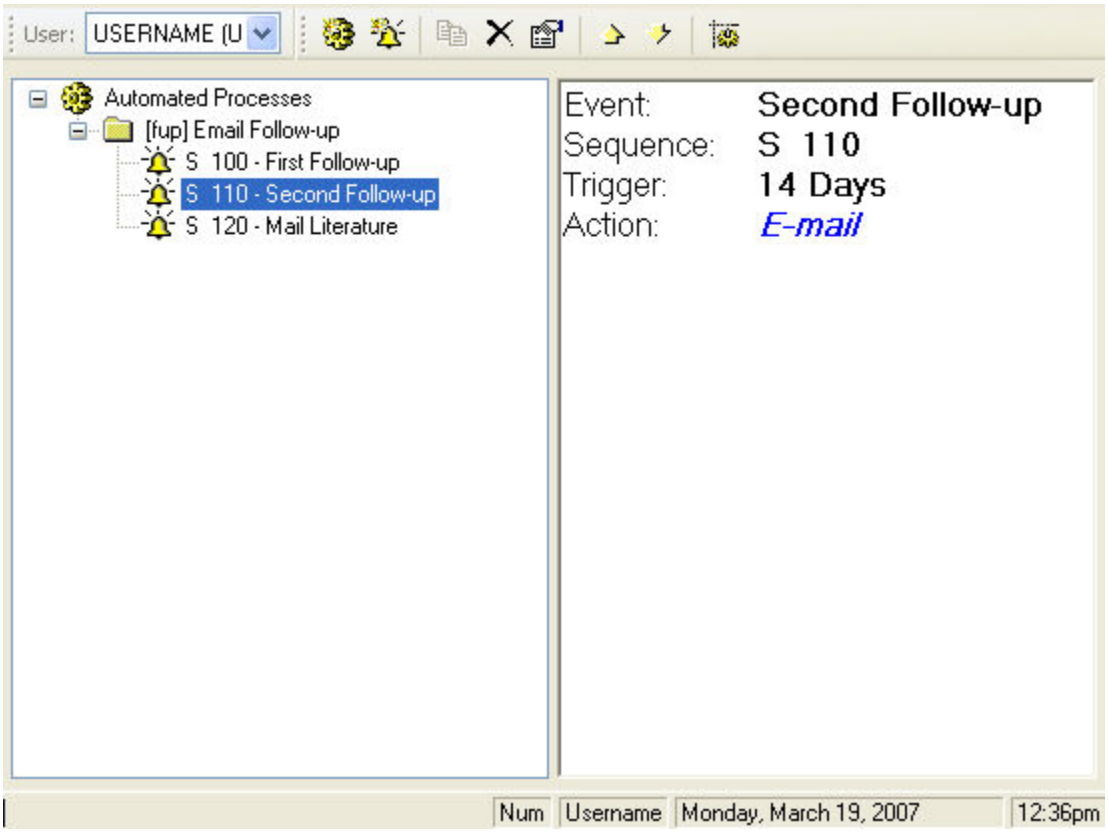
Automated Processes Center

The Automated Processes Center Main Window contains up to four elements. Click on the toolbar or one of the panes for more information

When a **Track** is selected:



When an **Event** is selected:



Automated Process Wizard

Creating Events

Events are the triggered actions that take place in a specific order. Each Automated Process, or track, can have up to 900 sequential events and 100 preemptive events. Create or edit events using:

- **Automated Process Event Wizard:** Available when right-clicking and select **New**.
- **Event Properties dialog box:** Available while creating or editing an Automated Process.

Creating Triggers

Each Automated Process event is processed based on a trigger. The trigger evaluates and, if the criteria is met, the event's action is performed and processing continues to the next event. Select one of these from the drop-down list and configure the associated settings:

- Elapsed Days

  Specify the number of days that must pass before the action is executed. GoldMine begins counting days as soon as the event immediately prior to the current event is triggered. If an event is the first event of the track, GoldMine begins counting days as

soon as the event is attached to a Contact Record. You can also select **Trigger Filter** and click **Filter**. The **Expression Builder** dialog box appears.

- Immediate

  Sets GoldMine to immediately execute the action associated with the event. This allows you to set up a sequence of actions based on a single trigger. You can also select **Trigger Filter** and click **Filter**. The **Expression Builder** dialog box appears.

- Detail Record

  Specifies that the processing of an event's action cannot be executed until a specified detail record, document link, other contact, or referral has been added to the Contact Record. Configure the following settings:

  - Click **Options** to configure the **Detail Trigger** dialog box.
  - Select **Attempt trigger only once** to branch to the next event whether or not the current event is triggered. If the current event is triggered, GoldMine executes the corresponding action, then continues to the trigger of the next event. However, if the event is not triggered, GoldMine skips the event, and continues to the trigger of the next event. For example, a track might include two events: Send a gift to contacts who make purchases over a specified dollar amount and print a thank-you letter to a contact who makes any purchase. Selecting **Attempt to trigger only once** enables GoldMine to print the thank-you letter for all purchases, regardless of the dollar amount.
  - Select **Trigger Filter** and then click **Filter**. The **Expression Builder** dialog box appears, allowing you to specify additional conditions based on a dBASE expression.

- **History Activity**

  Specifies that the processing of the event's action cannot be executed until a specified history record has been saved for the Contact Record. Configure the following settings:

  - Click **Options** to configure the **History Trigger** dialog box.
  - Select **Attempt trigger only once** to branch to the next event whether or not the current event is triggered. If the current event is triggered, GoldMine executes the corresponding action, then continues to the trigger of the next event. However, if the event is not triggered, GoldMine skips the event, and continues to the trigger of the next event. For example, a track might include two events: Send a gift to contacts who make purchases over a specified dollar amount and print a thank-you letter to a contact who makes any purchase. Selecting **Attempt to trigger only once** enables GoldMine to print the thank-you letter for all purchases, regardless of the dollar amount.
  - Select **Trigger Filter** and then click **Filter**. The **Expression Builder** dialog box appears, allowing you to specify additional conditions based on a dBASE expression.

- Scheduled Activity

Specifies that the processing of an event's action cannot be executed until a selected activity type has been scheduled for the contact. Configure the following settings:

- Click **Options** to configure the **Schedule Activity** dialog box.
- Select **Attempt trigger only once** to branch to the next event whether or not the current event is triggered. If the current event is triggered, GoldMine executes the corresponding action, then continues to the trigger of the next event. However, if the event is not triggered, GoldMine skips the event, and continues to the trigger of the next event. For example, a track might include two events: Send a gift to contacts who make purchases over a specified dollar amount and print a thank-you letter to a contact who makes any purchase. Selecting **Attempt to trigger only once** enables GoldMine to print the thank-you letter for all purchases, regardless of the dollar amount.
- Select **Trigger Filter** and then click **Filter**. The **Expression Builder** dialog box appears, allowing you to specify additional conditions based on a dBASE expression.

- Opportunity

Specifies that the processing of the event's action cannot be executed until a specified opportunity record has been recorded for the Contact Record. Configure the following settings:

- Click **Options** to configure the **Opportunity Trigger** dialog box.
- Select **Attempt trigger only once** to branch to the next event whether or not the current event is triggered. If the current event is triggered, GoldMine executes the corresponding action, then continues to the trigger of the next event. However, if the event is not triggered, GoldMine skips the event, and continues to the trigger of the next event. For example, a track might include two events: Send a gift to contacts who make purchases over a specified dollar amount and print a thank-you letter to a contact who makes any purchase. Selecting **Attempt to trigger only once** enables GoldMine to print the thank-you letter for all purchases, regardless of the dollar amount.
- Select **Trigger Filter** and then click **Filter**. The **Expression Builder** dialog box appears, allowing you to specify additional conditions based on a dBASE expression.

- **Project**

Specifies that the processing of the event's action cannot be executed until a specified project record has been recorded for the Contact Record. Configure the following settings:

- Click **Options** to configure the **Project Trigger** dialog box.
- Select **Attempt trigger only once** to branch to the next event whether or not the current event is triggered. If the current event is triggered, GoldMine executes the corresponding action, then continues to the trigger of the next event. However, if the event is not triggered, GoldMine skips the event, and continues to the trigger of the next event. For example, a track might include two events: Send a gift to contacts who make purchases over a specified dollar amount and print a thank-you letter to a contact who makes any purchase. Selecting **Attempt to trigger only once** enables GoldMine to print the thank-you letter for all purchases, regardless of the dollar amount.
- Select **Trigger Filter** and then click **Filter**. The **Expression Builder** dialog box appears, allowing you to specify additional conditions based on a dBASE expression.

- dBase Condition

  Specifies that the event's action can be executed only after a specified dBase expression is evaluated as true. To access the **Expression Builder** dialog box, from which you can select an existing expression or create an expression, select **Options**. Configure the following settings:

  - Click **Options** to configure the dBASE Expression Builder dialog box.
  - Select **Attempt trigger only once** to branch to the next event whether or not the current event is triggered. If the current event is triggered, GoldMine executes the corresponding action, then continues to the trigger of the next event. However, if the event is not triggered, GoldMine skips the event, and continues to the trigger of the next event. For example, a track might include two events: Send a gift to contacts who make purchases over a specified dollar amount and print a thank-you letter to a contact who makes any purchase. Selecting **Attempt to trigger only once** enables GoldMine to print the thank-you letter for all purchases, regardless of the dollar amount.
  - Select **Trigger Filter** and then click **Filter**. The **Expression Builder** dialog box appears, allowing you to specify additional conditions based on a dBASE expression.

- Disabled

  Turns off the trigger condition setting for the selected event.

Creating Actions

Each Automated Process event has a triggered action. The trigger is evaluated and if the criteria is met, the event's action is performed. Select one of these actions from the drop-down list, then click **Options** to configure the associated settings:

- **Print Form**
- **E-mail message**
- **Print Report**
- **Schedule Activity**
- **Create History**
- **Create Detail**
- **Add to Group**
- **Update Field**
- **Remove Track**
- **Add a New Track**
- **Branch to Event**
- **Run Application**

Creating Tracks

Create, clone, or modify Automated Process **Tracks** with the GoldMine Automated Processes Wizard.

Note: Planning is key. Take time to determine what you want to accomplish, how the triggers and actions work together for each preemptive or sequential event, and how the series of events, the track, will fit together.

1. Select **Tools>>Automated Processes>>Manage Processes**. The **Automated Processes Center** appears.
2. From the drop-down list, select the **User** who owns this Automated Process.
3. Right-click **Automated Processes** in the left pane and select **New**, or click the **New Automated Process** button . The **Welcome to the Automated Process Wizard** dialog box appears.
4. In the **Process Name** text box, type a descriptive name.
5. Type or select the **Process Code** from the F2 Lookup list.
6. Select the **Owner**. By default, the user name selected in the Automated Process Center displays.
7. Click **Next**. The **GoldMine Automated Process Wizard: Options** dialog box appears.
8. Select:
    - **Allow only one attachment of this process per contact:** Prevents multiple attachment of the same track to a contact's record.

Note: If two duplicate contact records are merged that already have automated processes attached, both processes will be attached to the merged contact record, regardless of whether the above checkbox was selected.

- **Execute this process immediately upon attachment:** Starts processing the track as soon as a user attaches the track to one or more contact records.
- **Execute this process only when scanning a group of contacts:** Prevents GoldMine from executing a track attached to a single contact record. This option is useful to restrict track execution to a specific system. Example: if a print action requires a designated workstation printer, selecting this option and **Execute this process immediately upon attachment** prevents the printing track from running from any other workstation.
- **Restart this process each time that it ends:** Reattaches the track as soon as the processing of the track completes.
- **Allow users to attach this process:** Permits other users to select and attach the track.
- **Attach this process to all new contact records:** Automatically attaches the track to each new contact record. Apply only to one Automated Process (can only be applied to one Automated Process).

9. Click **Next**. The **GoldMine Automated Process Wizard: Events** dialog box appears. The dialog box displays the **Seq** (Sequence), **Event**, **Trigger**, and **Action** for each event. While creating a new track, the display is empty.
10. Select from:
    - **New:** A blank **Event Properties** dialog box appears. Lets you create an event.
    - **Delete:** Deletes the selected.
    - **Edit:** The **Event Properties** dialog box displays the selected event's settings. Edit and save.

11. Click **OK**. The **GoldMine Automated Process Wizard: Events** dialog box appears.
12. Click **New** to add another event, or when you finish adding events, click **Next**. The **Finish** dialog box appears.
13. Click **Finish**. For the Automated Process to work, attach the track and process the track.

Track Attachments to Contacts

Attaching Tracks to a Contact

Before an Automated Process can be executed, the track must be attached to selected Contact Records. One record can have multiple tracks assigned to it. GoldMine stores the attached tracks

on the **Tracks** tab. Build tracks in the Automated Processes Center, then manually attach a track to a record.

Attaching Tracks to a Single Contact Record:

1. Right-click in the **Tracks** tab and select **Attach a Process**. The **Attach an Automated Process** dialog box appears.
2. Select the track to add from the **Code** and **Process Name** list.
3. Select **Attaching User** from the drop-down list.
4. Click **OK** to attach the track and continue.

Attaching Tracks to Multiple Contact Records:

1. Select **Tools>>Automated Processes>>Execute Processes**. The **Automated Processes Execution** dialog box appears.
2. Select either:
   - **Scan current contact:** GoldMine processes only the active contact, then returns to an idle mode.
   - **Scan a group of contacts:** Select **ALL Contact Records!** or a filter or group as the basis for selecting contacts. GoldMine processes the contacts in the filter or group, then returns to idle mode.

3. GoldMine scans to evaluate and execute attached tracks. In the **Scan Method** area, select from:
   - **Scan once:** Executes the track as you attach it.
   - **Scan continuously:** Scans the database continuously as configured in the Server Agents Administrator.
   - **Do not scan:** Attaches the track, but does not evaluate it for execution (available only when selecting **Attach Track to selected contacts**).

4. Select **Attach Track to selected contacts**.
5. Select the track to be attached from the drop-down list.

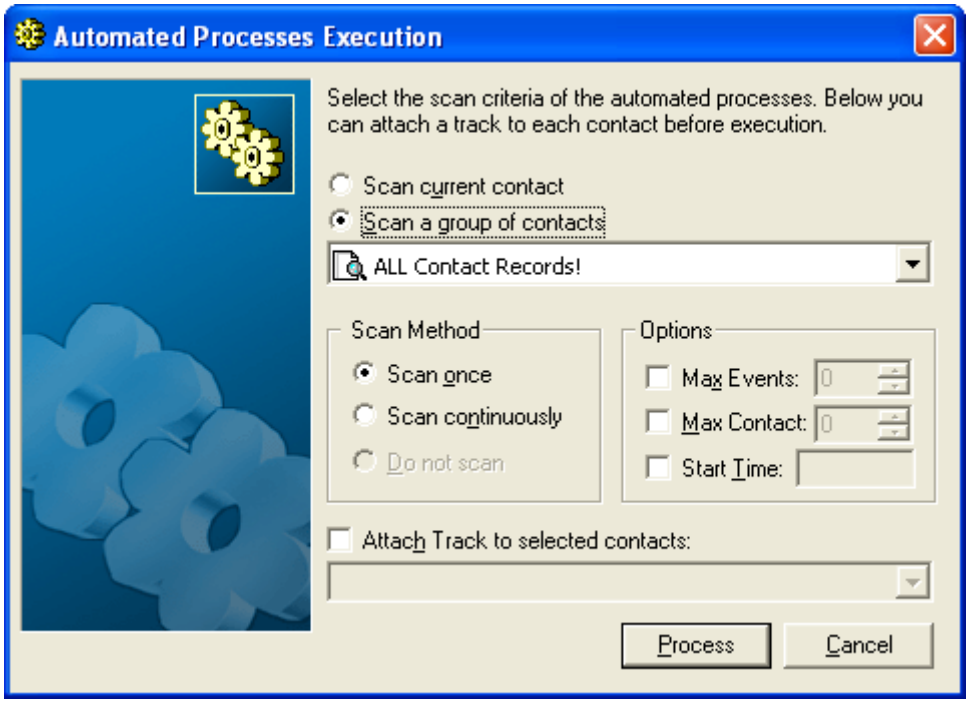
6. Click **Process**. The **Process Monitor** appears, tracking the attachments and the events triggered.

Processing Tracks

Executing Tracks

Execute a track for a single contact, a group of records based on a filter or group, or for all contacts. Execute a track manually whenever necessary, or set GoldMine to scan the database continuously, or use the Automated Process Server Agent.

1. Select **Tools>>Automated Processes>>Execute Processes**. The **Automated Processes Execution** dialog box appears.



2. Select one:
   - **Scan current contact:** GoldMine processes only the active contact, then returns to an idle mode.
   - **Scan a group of contacts:** Select ALL Contact Records, or select a filter or group from the drop-down list.

3. In the **Scan Method** area, select one:
   - **Scan once:** GoldMine scans the contact database, or the contacts selected by a filter or group, and processes all tracks. When complete, it returns to an idle mode, unless you have the Automated Processes Server Agent running. If running, the Automated Process scans again in the timeframe designated.
   - **Scan continuously:** GoldMine scans the contact database and processes all tracks, then repeats the process continuously. This allows you to set up a workstation on the network that continuously scans for triggered events and immediately performs the event actions. It can be interrupted by selecting Stop in the GoldMine Process Monitor dialog box.

Note: The option **Do not scan** is available only when you select **Attach Track to selected contacts**, which lets you attach tracks without scanning the database for tracks to execute.

4. In the **Options** area, configure:
   - **Max Events:** Maximum number of events (up to 99,999) to be processed during this scan.

Tip: To control the number of letters printed at one time, set the Max Contact to process only 25 records per day, or queue the print job to print manually or in off hours using the Print/Fax Server Agent.

   - **Max Contact:** Maximum number of contact records (up to 99,999) evaluated.

- **Start Time:** Sets a time to start processing the track. Use this option to take advantage of periods of lower demand to run the process. To set the time using the graphical clock, press **F2**.

5. Click **Process**. The Process Monitor appears, displaying the number of contacts scanned and triggered.

Configuring Automated Processes in the Server Agents Administrator

Use the Server Agents Administrator to execute Automated Processes on the days and times specified.

1. Select **Tools>>Services>>Manage Server Agents**. The **Server Agents Administrator** dialog box appears.
2. Click the **Automated Process** tab.
3. If letting only one user execute processes using the Server Agent, select the user in the **User's Settings** area drop-down list.
4. Select **Apply to other users** to enable the **Select Users** button and let other users use the Server Agent capability. Click **Select Users** to select one or more users or user groups.
5. In the **Active Period** area, select the days of the week the agent will be active.
6. Type or select the active time period for each day using the right-facing arrows to access a list of times in thirty minute increments.

Note: Because times are set on a daily basis, the earliest time is 12:00 A.M. and the latest is 11:59 P.M. The latest time cannot be 12:00 A.M. When setting the times, consider the full range of Server Agents you are running and what activities can take place after regular business hours. Depending on the process being executed, you may find it takes up too many system resources. If so, limit the processing to non-business hours.

7. In the **Frequency** area, type or select the number of **day(s), hour(s), minute(s)** GoldMine waits before initiating the operation.

Note: The minimum amount of time is 5 minutes.

8. Click **OK**.

Note: You must start the Server Agents to begin processing.

Managing with Server Agents

About the Server Agents Administrator

Use the Server Agents Administrator to process these operations on a recurring basis:

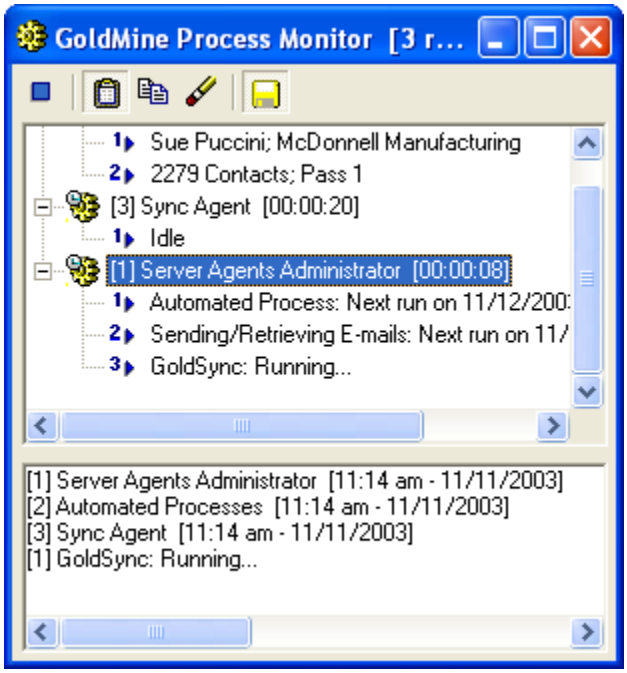
- Sending and retrieving e-mail from the Internet through GoldMine
- Synchronizing with GoldSync
- Synchronizing with Microsoft Outlook
- Printing and faxing correspondence
- Running Automated Processes
- Publishing Calendar information

Server Agents are configured around a user or user group, active time periods, and frequency. They work with other configurable parts of GoldMine and must be started for the processes to work.

Starting the Server Agents

Start the Server Agents for the settings you configured in the Server Agents Administrator to take effect.

1. Select **Tools>>Services>>Start Server Agents**.
2. The **Process Monitor** appears displaying information about the Server Agents running. The agents continue to run until you click the stop processes button on the Process Monitor.


GoldMine Process Monitor [3 r...
Sue Puccini; McDonnell Manufacturing
2279 Contacts; Pass 1
[3] Sync Agent [00:00:20]
Idle
[1] Server Agents Administrator [00:00:08]
Automated Process: Next run on 11/12/200:
Sending/Retrieving E-mails: Next run on 11/
GoldSync: Running...
[1] Server Agents Administrator [11:14 am - 11/11/2003]
[2] Automated Processes [11:14 am - 11/11/2003]
[3] Sync Agent [11:14 am - 11/11/2003]
[1] GoldSync: Running...

Managing Databases

About Managing Information

GoldMine's extensive feature set lets you share data between GoldMine and other applications, to globally replace field data, and to monitor running processes.

Maintaining the data in your GoldMine database ensures the highest performance for your system and the most effective use of information. GoldMine is equipped with many features to help maintain your system.

Understanding GoldMine Databases

About the GoldMine Architecture

The GoldMine File System

GoldMine stores information in one or more databases in which related records are logically organized. Storing information in a database provides advantages such as a common point of access for multiple users, applications, and data security.

Network applications managing information typically organize shared data in a relational database structure, supervised by a Database Management System (DBMS). The DBMS supervises maintenance of and access to the database. It has a database engine that defines the database structure, stores data, and responds to requests by retrieving data from the stored locations. The DBMS can organize data in one large database that stores all system data or in multiple unique databases in the same system.

Information systems today facilitate quick and reliable data management and retrieval using the relational database. At the most basic level, a relational database consists of tables organizing data in columns and rows. The cell at any column/row can contain only one value. Columns and rows work together to define the type of information a cell contains.

GoldMine, acting as a DBMS, uses a number of different files to store various elements of the data it collects:

- In GoldMine Standard, the default installation places the GoldMine files, Contact files, and System files in folders under the main GoldMine folder.
- In a GoldMine Corporate Edition installation, the shared database files and Contact files are hosted on the server database while licensing and user files remain local to the GoldMine folder.

In a network environment, you can run workstations from the executable on the server. You can also install GoldMine's executable files locally to a workstation if the data files are centrally located and accessible to all GoldMine users. The physical configuration of GoldMine on the hard drive is important. The main GoldMine executables should always be one level deep in a directory structure. The path to GoldMine should be x:\GoldMine, where x is the network drive where GoldMine is installed. Installing by using Universal Naming Convention (UNC) paths, the server path should be \\server\GoldMine\GoldMine or \\server\sharename\GoldMine.

File Server and Client/Server Architecture

Networks require configuration that manages shared data stored in a central location. Users need a way of accessing information from the central file(s), and the organization needs a way of protecting data integrity and controlling traffic to maintain the availability of shared resources. These needs are met using file server and client/server architecture.

Client/Server Architecture

GoldMine Premium Edition utilizes a client/server architecture:

- The client/server uses network resources more efficiently to reduce network traffic and respond to requests for data while maintaining data security.
- The client/server architecture effectively divides the functions of the DBMS between the client and the server.
- The server acts as the database engine maintaining and administering access to the data.

- When the server receives a request from a client, the server scans the database for data on the server and returns only the requested piece rather than a whole block.
- Processing occurs at the server, so the server sends back the data in final form as the response to the query.
- Structured Query Language (SQL) is the tool enabling the application user interface to communicate with the server database engine.

GoldMine Files and File Locations

The GoldMine tables, also known as GoldMine files for legacy purposes, GoldMine database, or GMBase, are tables storing shared database information. Although you may have multiple Contact Sets, you should only have one set of GoldMine files. Knowing the contents of these files is invaluable when creating reports or troubleshooting GoldMine.

Note: For information on creating custom fields in GoldMine databases hosted to SQL Server, consult Technical Document 527, "Working With Custom Fields in MS SQL."

Locations of the GoldMine files:

	GoldMine Files	Contact Files	System Files
Undocked user default folders	**GMBase**	**Common**	**GoldMine**
Login Tab (Edit Preferences)	**GoldMine database**	**Default contact database**	**GoldMine home directory**
GM.ini Commands	**GoldDir=**	**CommonDir=**	**SysDir=**

(See a List of GoldMine Tables)

ODBC Database Manager

Several GoldMine functions, especially the GoldMine Premium Edition Answer Wizard and integration with HEAT, use Open Database Connectivity (ODBC). When GoldMine is installed, it creates default data sources in the ODBC Data Source Administrator.

To verify or change the ODBC settings, select **Start>>Settings>>Control Panel**. Select **Data Sources (ODBC)** or **Administrative Tools>>Data Sources**, depending upon your operating system, and double-click to launch the **ODBC Data Source Administrator**. Click the **System DSN** tab. The default data source is **GM Sales_Mktg**. Click **Configure** to change or verify the settings or **Add** to add a data source using the wizard. Verify these settings:

- Name of the data source.
- Description of the data source.

- The name of the server where the SQL Server is located.
- SQL Server authentication.
- The SQL login and password.
- Default database you are creating the data source for.

Click **Finish** and **Test Data Source** to test your connection.

GoldMine's Data Files

GoldMine Table Structure

GoldMine tables and Contact tables make up the GoldMine database, which consists of data organized in columns and rows. Cells at any column/row can contain only one value. Columns and rows work together to define the type of information a cell can contain.

- **Columns:** Each column contains values providing information of one type such as Company, City, or State, and each column represents a field. One column, or a combination of columns, is the unique index (the unique value each record can be identified by).
- **Rows:** Each row contains one record consisting of a set of column values. A table can contain as few as 0 rows or an unlimited number of rows. SQL Server can retrieve data from tables by working with relationships represented by common data values between tables. A common data value is a value that is the same between multiple tables. For example, both a Contact1 table and a Cal table contain AccountNo values. The shared value creates the relationship between the records in the 2 tables.

GoldMine Tables

- **Cal** table contains a record for each scheduled activity. Different record types are distinguished by the RecType. Each record type may use the same field for differing purposes. The Cal table is part of the GoldMine files.

Field Name	Type	Length	Description
USERID	String	8	User Name
ACCOUNTNO	String	20	Account number of linked contact
ONDATE	Date	8	Activity date
ONTIME	String	5	Activity time
ENDDATE	Date	8	Ending date of scheduled activity
ALARMFLAG	String	1	Alarm flag
ALARMTIME	String	5	Alarm time
ALARMDATE	String	8	Alarm date
ACTVCODE	String	3	Activity code
RSVP	String	1	RSVP notification
DURATION	Integer	3	Duration/Probability
RECTYPE	String	1	Record type
ACONFIRM	String	3	Meeting confirmation
APPTUSER	String	10	Meeting confirmation user
STATUS	String	4	First character is flag, second character=1 if notes exist
DIRCODE	String	10	Contact Set code of the contact file

NUMBER1	Integer	8	Sales potential
NUMBER2	Integer	8	Units of a forecasted sale
COMPANY	String	60	Company/Contact name
REF	String	80	Reference
NOTES	Memo	1	Notes
LINKRECID	String	15	Linked record ID
LDOCRECID	String	15	Reserved for future use
LOPRECID	String	15	Linked Opportunity Manager record ID
CREATEBY	String	8	Created by user
CREATEON	Date	8	Creation date
CREATEAT	String	6	Creation time
LASTUSER	String	8	Last modified by
LASTDATE	String	8	Last modified date
LASTTIME	Date	8	Last modified time
RECID	String	15	Record ID

- **Fields5** stores the location and tab order of every field within the Fields tab and the field position and tab order of the primary contact fields.
- **Filters** holds all filters created in the system.

- **Forms** stores the merge form template properties added to the merge forms system.
- **FormsFld**
- **FormsQue**
- **GMTLog**, with the ContTlog table, controls the synchronization process. The Primary Tlog holds the synchronization time stamp for the tables in the GoldMine files, such as Cal, Filters, and others.
- **GSLogs**
- **GSServer**
- **GSSites**
- **InfoMine** stores data from the InfoCenter. The InfoCenter is part of the GoldMine files.

Field Name	Type	Len	Description
ACCOUNTNO	String	20	Account number
CREATEBY	String	8	Creation user
RECTYPE	String	10	Record type
SORTKEY	String	20	Sort key
TSECTION	String	100	Section
TOPIC	String	80	Topic
KEYWORDS	String	80	Keywords
OPTIONS	String	10	Options
OPTIONS1	String	20	Options 1
OPTIONS2	String	20	Options 2
LINKEDDOC	Memo	1	Linked document
NOTES	Memo	1	Notes
USERREAD	String	8	Read access
USERWRITE	String	8	Write access
LASTUSER	String	8	Last modified by
LASTDATE	Date	8	Last modified date
LASTTIME	String	5	Last modified time
RECID	String	15	Record ID

- **ImpExp** stores the Import/Export profiles used to export and import data.
- **LeadDbfs** holds leads analysis definitions set from the **View>>Analysis** menu.
- **Lookup** contains each F2 Lookup entry. The Lookup table is part of the GoldMine files.

Field Name	Type	Len	Description
FIELDNAME	String	11	Field name
LOOKUPSUPP	String	10	Lookup Options
ENTRY	String	40	Description
RECID	String	15	Record ID

- **Mailbox** stores all GoldMine e-mail. The Mailbox is part of the GoldMine files. The history display of messages pulls information from here. If an e-mail message has an attachment, it stores in the **\goldmine\mailbox\attach** folder by default.

Field Name	Type	Len	Description
LINKRECID	String	15	Linked Record ID
FLAGS	String	8	Flags The Flags field stores numeric values specifying the following: Value / On / Off 1 / Read / Not read 2 / In History / Not in History 3 / Outbound / Inbound 4 / Attachments / No attachments
USERID	String	8	User name
FOLDER	String	20	Folder The Folder field contains the name of the folder in which the mail is stored. GoldMine uses the following predefined folders: X-GM-INBOX / Inbox X-GM-OUTBOX / Outbox X-GM-TEMPLATES / Templates
FOLDER2	String	20	Subfolder
ACCOUNTNO	String	20	Account number
CREATEON	Date	8	Creation date
MAILSIZE	String	8	Mail size

MAILDATE	Date	8	Mail date
MAILTIME	String	8	Mail time
MAILREF	String	100	Linked contact name and subject line
RFC822	Memo	1	Mail message
RECID	String	15	Record ID

- The OpMgr table contains the data in the Opportunity and Project Managers. The OpMgr table is part of the GoldMine files.

Field Name	Type	Len	Description
OPID	String	15	Opportunity ID
RECTYPE	String	3	Record Type
ACCOUNTNO	String	20	Account number
USERID	String	8	User name
FLAGS	String	10	Flags
COMPANY	String	40	Company
CONTACT	String	40	Contact
NAME	String	50	Opportunity name
STATUS	String	50	Status
CYCLE	String	50	Cycle
STAGE	String	30	Stage
SOURCE	String	30	Source
F1	String	20	
F2	String	20	
F3	String	10	
STARTDATE	Date	8	Start date
CLOSEDDATE	Date	8	Close date
CLOSEBY	Date	8	Close by
FORAMT	Float	10	For amount
FORPROB	Integer	4	Probability
CLOSEAMT	Float	10	Close amount
NOTES	memo	1	Notes
RECID	String	15	Record ID

- **OpMrgFld**
- **PerPhone** serves as personal contacts, containing names and phone numbers. The PerPhone table is part of the GoldMine files.

Field name	Type	Len	Description
RECTYPE	String	1	Record type
USERID	String	8	User name
STATUS	String	2	International or U. S. phone format
CONTACT	String	30	Contact name
PHONE1	String	16	Phone number
RECID	String	15	Record ID

- **Report32** holds the report definitions and settings appearing in the **Reports Menu** dialog box.

- **ResItems** contains the resource(s) you created, such as equipment, facilities, and other resources scheduled from the Resources' Master File. The ResItems table is part of the GoldMine files.

Field Name	Type	Len	Description
NAME	String	8	Name
CODE	String	10	Code
RESDESC	String	40	Description
CUSTODIAN	String	8	Custodian
NOTES	Memo	1	Notes
RECID	String	15	Record ID

- **Scripts** holds telemarketing branching scripts.
- **SPFiles** is the directory of the GoldMine Contact Set databases. The SPFiles table is part of the GoldMine files.

Field Name	Type	Len	Description
DIRNAM	String	35	Contact file description
DIRPTH	String	100	Contact file path
USERID	String	8	Contact file user
DIRCODE	String	10	Contact Set code
DBPASSWORD	String	36	Database password
DRIVER	String	25	Database driver
RECID	String	15	Record ID

- **SysLog** is a global table used by all databases and processes. It records errors occurring when using the database tables. This table can be deleted if a user is running out of disk space and the old tables are no longer needed for troubleshooting. The system creates a new log.
- **Tracks** holds the Automated Processes track definitions.
- **UserLog**

Contact Tables

- **Contact1** contains the main contact fields, such as name, company, address, and the Key1 through Key5 tables. The Contact1 table is part of the Contact files.

Field Name	Type	Len	Description
ACCOUNTNO	String	20	Account number
COMPANY	String	40	Company name
CONTACT	String	40	Contact name
LASTNAME	String	15	Contact's last name
DEPARTMENT	String	35	Department
TITLE	String	35	Contact title
SECR	String	20	Secretary
PHONE1	String	25	Phone 1
PHONE2	String	25	Phone 2
PHONE3	String	25	Phone 3
FAX	String	25	Fax number

EXT1	String	6	Phone extension 1
EXT2	String	6	Phone extension 2
EXT3	String	6	Fax extension is EXT3 to maintain compatibility with previous versions
EXT4	String	6	Phone extension 3
ADDRESS1	String	40	Address 1
ADDRESS2	String	40	Address 2
ADDRESS3	String	40	Address 3
CITY	String	30	City
STATE	String	20	State
ZIP	String	10	Zip code
COUNTRY	String	20	Country
DEAR	String	20	Dear (Salutation)
SOURCE	String	20	Lead source
KEY1	String	20	Key 1
KEY2	String	20	Key 2
KEY3	String	20	Key 3
KEY4	String	20	Key 4
KEY5	String	20	Key 5
STATUS	String	3	Internal status ▪ Position 1 tracks the type of phone number. If the first character is U, the USA-style phone format is used. ▪ Position 2 tracks curtaining level (0=None, 1=partial, 2=full, 3=semi-partial) ▪ Position 3 indicates a record alert if the value is 1.
NOTES	Memo		Notes
MERGECODES	String	20	Merge codes for contact
CREATEBY	String	8	Creation user
CREATEON	Date	8	Creation date
CREATEAT	String	8	Creation time
LASTUSER	String	8	Last modified by
LASTDATE	Date	8	Last modified date
LASTTIME	String	6	Last modified time
RECID	String	15	Record ID

Primary Fields Stored in the Contact1 Table

Field Name	Field Label	Indexed Field
COMPANY	COMPANY	Yes
CONTACT	CONTACT	Yes
DEPT	DEPT	No
TITLE	TITLE	No
SOURCE	SOURCE	No
LAST	LAST	Yes
DEAR	DEAR	No

SECR	ASST	No
ADDRESS1	ADDRESS1	No
ADDRESS2	[not displayed]	No
ADDRESS3	[not displayed]	No
CITY	CITY	Yes
STATE	STATE	Yes
ZIP	ZIP	Yes
COUNTRY	COUNTRY	Yes
MERGECODES	MERGECODES	No
PHONE1	PHONE1	Yes
EXT1	EXT	No
PHONE2	PHONE2	No
EXT2	EXT	No
PHONE3	PHONE3	No
EXT3	EXT	No
FAX	FAX	No
EXT4	EXT	No
KEY1	CONTACT TYPE	Yes
KEY2	INDUSTRY	Yes
KEY3	INTEREST	Yes
KEY4	ACCOUNT MNGR	Yes
KEY5	OPEN	Yes

Note: The AccountNo and the RecId fields are also indexed fields.

- **Contact2** contains additional fields associated with the Contact Record, primarily the user-defined fields. The Contact2 table is part of the Contact files. The fields listed below are added during installation. Add fields to this table beginning with U.

Field Name	Type	Len	Description
ACCOUNTNO	String	20	Account number
CALLBACKON	Date	8	Call back date
CALLBACKAT	String	8	Call back time (unused compatibility field)
CALLBKFREQ	Smallint	3	Call back frequency
LASTCONTON	Date	8	Last contact date
LASTCONTAT	String	8	Last contact time
LASTATMPON	Date	8	Last attempt date
LASTATMPAT	String	8	Last attempt time
MEETDATEON	Date	8	Meeting date
MEETTIMEAT	String	8	Meeting time
COMMENTS	String	65	Comments
PREVRESULT	String	65	Previous results
NEXTACTION	String	65	Next action
ACTIONON	Date	8	Next action date
CLOSEDATE	Date	8	Expected close date
USERDEF01	String	10	User-defined 1
USERDEF02	String	10	User-defined 2
USERDEF03	String	10	User-defined 3

USERDEF04	String	10	User-defined 4
USERDEF05	String	10	User-defined 5
USERDEF06	String	10	User-defined 6
USERDEF07	String	10	User-defined 7
USERDEF08	String	10	User-defined 8
USERDEF09	String	10	User-defined 9
USERDEF10	String	10	User-defined 10
USERDEF11	String	10	User-defined 11
USERDEF12	String	10	User-defined 12
USERDEF13	String	10	User-defined 13
USERDEF14	String	10	User-defined 14
USERDEF15	String	10	User-defined 15
USERDEF16	String	10	User-defined 16
RECID	String	15	Record ID

- **ContSupp** is the Supplementary Contact table, which contains a record for each additional contact, referral, and detail record. The different record types are distinguished by the contents of the RecType field. The different RecTypes may use each field for a different purpose.

Field Name	Type	Len	Description
ACCOUNTNO	String	20	Account number
RECTYPE	String	1	Record type
CONTACT	String	30	Contact name/Detail
TITLE	String	35	Contact's title/Referral's account number
CONTSUPREF	String	35	Reference/Detail header name and Detail tab name/Detail field 1
DEAR	String	20	Dear (salutation)
PHONE	String	20	Phone
EXT	String	6	Phone extension/Detail field 5
FAX	String	20	Fax number
LINKACCT	String	20	Linked account/Detail field 2
NOTES	Memo	1	Notes/Detail header field labels
ADDRESS1	String	40	Additional contact address/Detail field 7
ADDRESS2	String	40	Additional contact address 2/Detail field 8
CITY	String	30	Additional contact city/Detail user, date, and time
STATE	String	20	Additional contact state/Detail field 6
ZIP	String	10	Additional contact zip/Detail field 4
COUNTRY	String	20	Additional contact country/Detail field 3
MERGECODES	String	20	Merge codes
STATUS	String	4	First character is a flag, second character=1 if note exists
LINKEDDOC	Memo	10	Linked document
LASTUSER	String	8	Last modified by
LASTDATE	Date	8	Last modified date
LASTTIME	String	5	Last modified time
RECID	String	15	Record ID

- **ContHist** contains records of completed activities. The ContHist table is part of the Contact files.

Field Name	Type	Len	Description
USERID	String	8	User
ACCOUNTNO	String	20	Account number
SRECTYPE	String	1	First character of RecType
RECTYPE	Sting	10	Record type
ONDATE	Date	8	Action date
ONTIME	String	5	Action time
ACTVCODE	String	3	Activity code
STATUS	String	2	First character is flag, second equals 1 if notes exist.
DURATION	String	8	Duration
UNITS	String	8	Forecasted sale units
REF	String	65	Reference
NOTES	Memo	1	Notes
LINKRECID	String	15	Linked record ID
LOPRECID	String	15	Linked Opportunity Manager record
CREATEBY	String	8	Creation user
CREATEON	Date	8	Creation date
CREATEAT	String	8	Creation time
LASTUSER	String	8	Last modified by
LASTDATE	String	8	Last modified date
LASTTIME	String	6	Last modified time
RECID	String	15	Record ID

- **ContGrps** contains the **header** defining each group and the **members** of the groups. ContGrps table is part of the Contact files.

Header Records

Field Name	Type	Len	Description
USERID	String	15	Group user
CODE	String	8	Group code
ACCOUNTNO	String	20	Header information Positions: 1-8 — Value: "*M" Positions: 15-20 — Value: Total members in group
REF	String	24	Group reference
RECID	String	15	Record ID/Group number

Member Records

Field Name	Type	Len	Description
USERID	String	15	Group number (from group header)

CODE	String	8	Member sort value
ACCOUNTNO	String	20	Linked contact account number
REF	String	24	Member reference
RECID	String	15	Record ID

- **ContUdef** is a file specific to each database created within GoldMine. It stores name, type, and length of user-defined fields for the database and drives the rebuilding process by recreating the GoldMine database and working with the Fields5 table.

- **ContTlog** tables hold synchronization information for the contact set. Each contact database has its own ContTlog table. When a change is made to a contact database file (not calendar file), an entry is made in the Tlog tables with the field information and date and time of the change. When synchronization occurs, the Tlog tables determine what information transfers.

Note: The Tlog tables, for example, ContTlog and GMTlog, track (to the millisecond) the date and time of every change to the database to provide greater reliability. The Tlog keeps track of the field-level changes made to tables in the GoldMine database. Each Tlog record consists of two time stamps. LogStamp contains the date and time the record was changed, while SyncStamp contains the date and time the record was last synchronized.

Rectypes

Rectypes are codes identifying different types of records within the Cal, ContSupp, OpMgr, and ContHist tables in the database.

Calendar Rectypes

A	Appointment
C	Phone call
D	To-do
E	Event
F	Literature Request
L	Form
M	Sent message
O	Other Action
Q	Queued e-mail
S	Forecasted Sale

ContSupp Rectypes

C	Additional contact
E	Automated Process
L	Linked document
O	Organizational structure
P	Detail
H	Extended Detail header
R	Referral
T	Next Action

OpMgr Rectypes

O	Opportunity
OC	Influencer
PC	Contact
PK	Task

ContHist

The Rectypes in ContHist are created by combining letters and by placing the letters in one of four positions.

1st	2nd	3rd	4th	Definition
A				Appointment
C	**C**			Call back
C	**I**			Incoming call
C	**M**			Return message
C	**O**			Outgoing call
D				To-Do
M				When message is scheduled (Phone, GoldMine, or Internet message
L				Form (letter)
M	**G**			GoldMine e-mail message
M	**I**			Incoming Internet e-mail
M	**O**			Outgoing Internet e-mail
S				Completed sales
T				Next action
U				Unknown
		U		Unsuccessful
			R	RSVP
			P	Private
			B	Both RSVP and Private

Database Management

About Creating Databases

Use the Databases Wizard to create a database for new data or rehost an existing database to a new database. You can create or rehost the Contact files and/or the GoldMine files.

The Contact files contain all the tables related to the Contact records; when you create a new database, the database name is added to the Contact Set Databases dialog box. The GoldMine files contain the shared tables such as Calendar, Filters, Mailbox. When you create a new database of any of these files, GoldMine does not add the database name to the Contact Set Databases dialog box.

Rehosting creates a new database, but copies or converts data from the old database to the new one without affecting the original database. The rehosting process converts dBASE to Firebird or SQL, letting an organization support multiple platforms.

Opening Databases

GoldMine lets you have more than one Contact Set database. For example, departments within your company may use different databases.

1. Select **Tools>>Databases>>Open Database**. The **Contact Set Databases** dialog box appears.
2. Highlight the database to open and click **Open**. The new database opens with database name in the lower left corner of the GoldMine status bar.

About Creating Databases

Use the Databases Wizard to create a database for new data or rehost an existing database to a new database. You can create or rehost the Contact files and/or the GoldMine files.

The Contact files contain all the tables related to the Contact records; when you create a new database, the database name is added to the Contact Set Databases dialog box. The GoldMine files contain the shared tables such as Calendar, Filters, Mailbox. When you create a new database of any of these files, GoldMine does not add the database name to the Contact Set Databases dialog box.

Rehosting creates a new database, but copies or converts data from the old database to the new one without affecting the original database. The rehosting process converts dBASE to Firebird or SQL, letting an organization support multiple platforms.

Attaching Databases

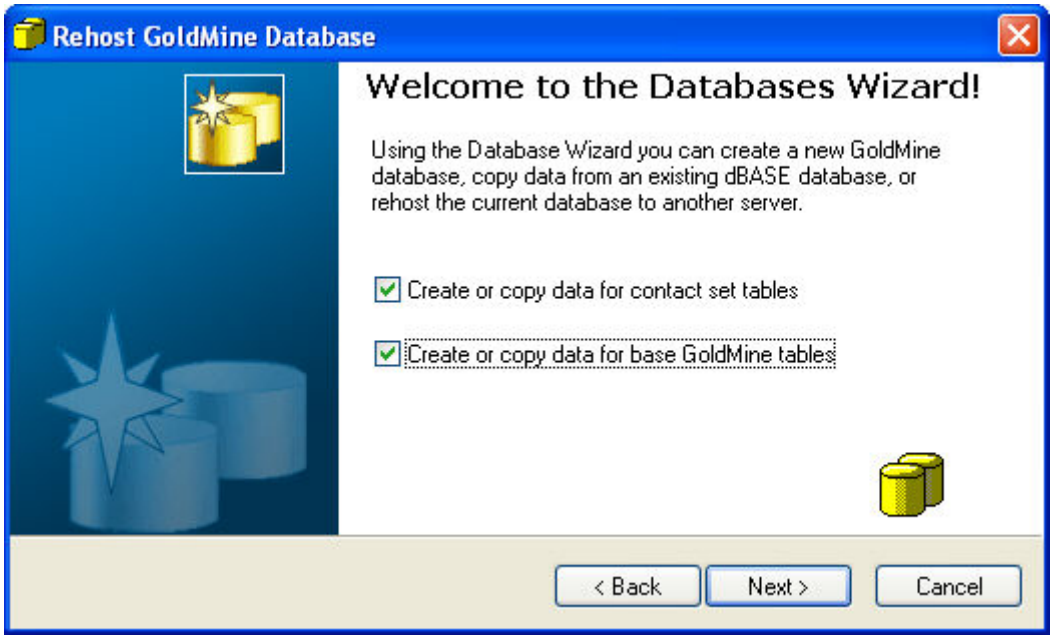
Attach an existing database to make it available in GoldMine. Then tell GoldMine where the database is located, who the owner is, and, if necessary, the SQL login information.

1. Select **File>>Open Database**. The **Contact Set Databases** dialog box appears.
2. Click **Attach**. The **Contact Set Profile** dialog box appears.
3. Update the fields as needed. See **Defining Contact Set Profiles** for a description of each field.
4. Click **OK**.

Using the Databases Wizard

Use the **Databases Wizard** to create a new database or contact set. The new database can be created as either a copy of the currently active database, or as an empty database containing the same fields as the currently active database. You can also copy data from a dBASE database.

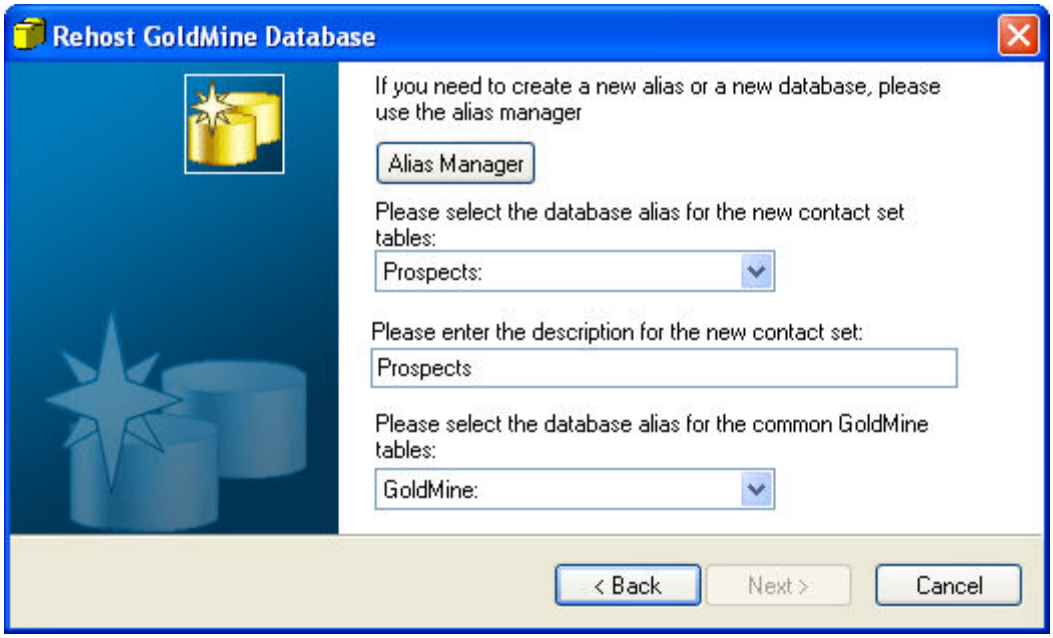
Select **Tools**>>**Databases>>New Database**. The **Welcome to the Databases Wizard** dialog box appears.


Rehost GoldMine Database
Welcome to the Databases Wizard!
Using the Database Wizard you can create a new GoldMine database, copy data from an existing dBASE database, or rehost the current database to another server.
Create or copy data for contact set tables
Create or copy data for base GoldMine tables
< Back
Next >
Cancel

- Select the check boxes corresponding to the type of data you will create or copy.
- **Contact set tables:** Select this option to create or rehost a new Contact Set.
- **Common GoldMine tables:** Select to create or rehost the shared GoldMine files. Select this option only if you are rehosting from dBASE to SQL or creating a complete copy of the entire database.

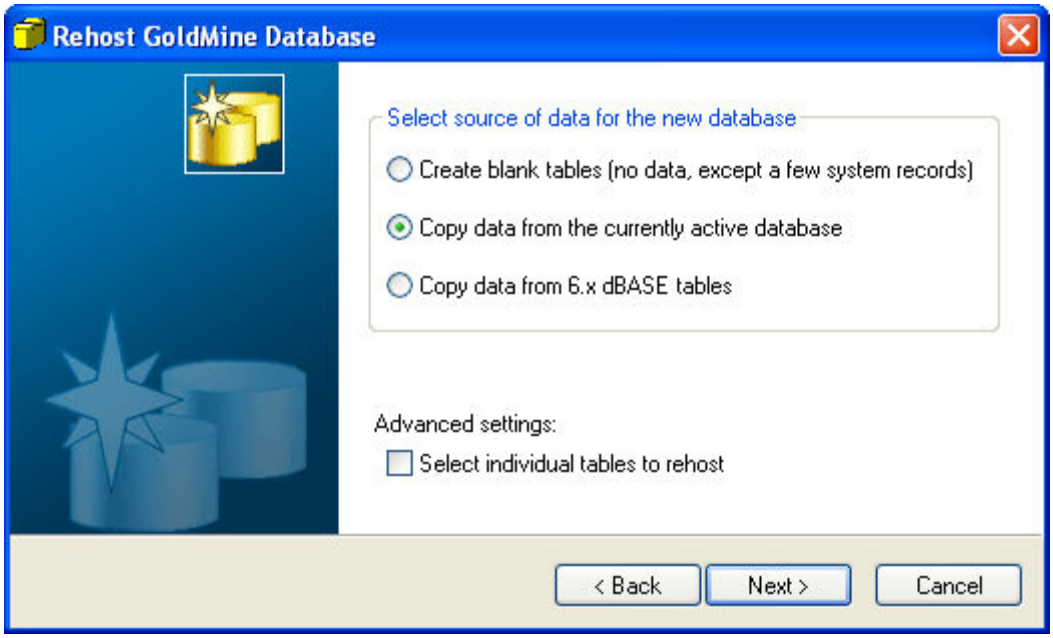
Note: For this example, both contact set and common GoldMine tables are selected.

Click **Next**. The following dialog appears:


Rehost GoldMine Database
If you need to create a new alias or a new database, please use the alias manager
Alias Manager
Please select the database alias for the new contact set tables:
Prospects:
Please enter the description for the new contact set:
Prospects
Please select the database alias for the common GoldMine tables:
GoldMine:
< Back
Next >
Cancel

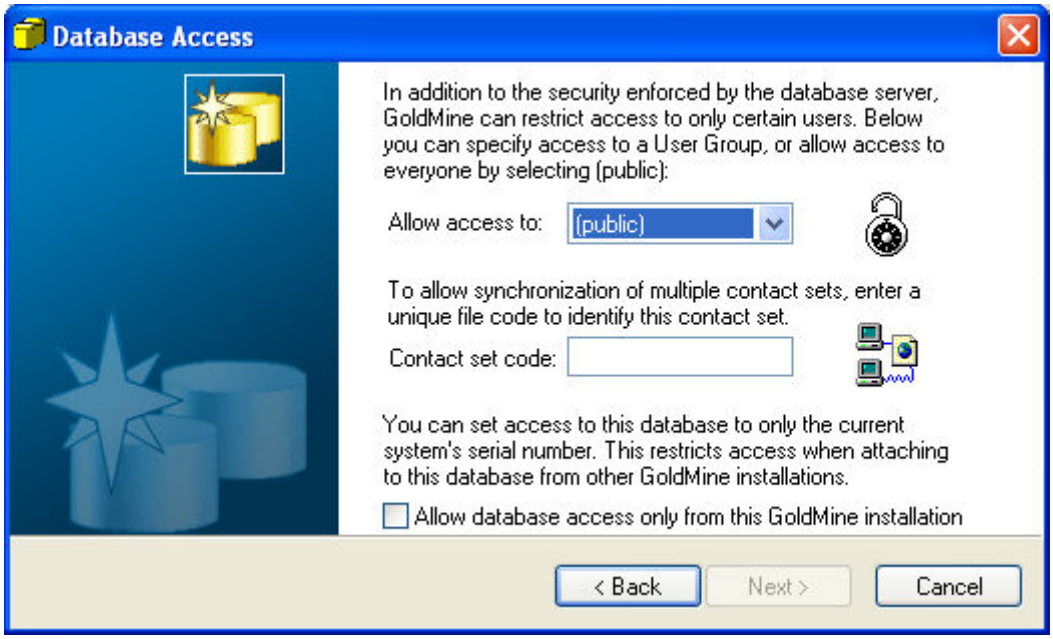
- To create a new alias or database, click the **Alias Manager** button. The Database Alias Manager dialog appears. After creating your new alias or database, the Databases Wizard will reappear.
- If you chose to create or copy **contact set tables** in the previous step of the Wizard, select the database alias for the new contact set from the drop-down menu, then enter a description for it in the text field below.
- If you chose to create or copy **common GoldMine tables** in the previous step of the Wizard, select the database alias for the new GoldMine tables from the drop-down menu.

Click **Next**. The following dialog appears:


Rehost GoldMine Database
Select source of data for the new database
Create blank tables (no data, except a few system records)
Copy data from the currently active database
Copy data from 6.x dBASE tables
Advanced settings:
Select individual tables to rehost
< Back
Next >
Cancel

- Select the data source for your new database using the radio buttons
- **Create blank tables: (no data, except for a few system records):** Select to create an empty database. Click **Next**, or go to **Select individual tables to rehost** below to individually select the tables for your new database.
- **Copy data from the currently active database:** Select to copy records from the currently active database into the new database. Click **Next**, or go to **Select individual tables to rehost** below to individually select the tables for your new database.
- **Copy data from 6.x dBASE tables:** Select to open a dialog for defining paths to external dBASE data.
- **Advanced Settings:**
  - **Select individual tables to rehost:** Select this check box to choose individual tables to rehost in your new database. Click **Next**. The **Rehost Selected Tables** dialog appears.

Once dBASE and Rehosting processes are completed, or if these optional steps are not selected, the **Database Access** dialog appears


Database Access
In addition to the security enforced by the database server, GoldMine can restrict access to only certain users. Below you can specify access to a User Group, or allow access to everyone by selecting (public):
Allow access to:
(public)
To allow synchronization of multiple contact sets, enter a unique file code to identify this contact set.
Contact set code:
You can set access to this database to only the current system's serial number. This restricts access when attaching to this database from other GoldMine installations.
Allow database access only from this GoldMine installation
< Back
Next >
Cancel

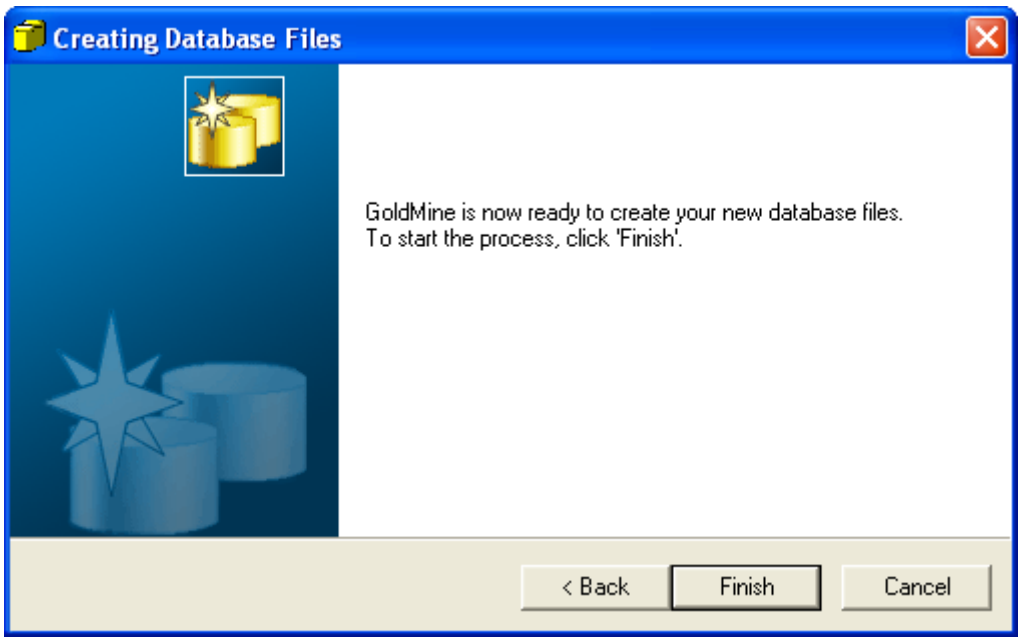
- From the **Allow access to** drop-down list, accept the default **(public)**. This grants access to all users and groups. To select a user or user group, select a name in the drop-down list.
- In the **Contact set code** text box, type a unique value (such as, **GM7_P**). GoldMine uses this to associate synchronized data with the correct database, regardless of its local name.

Example: An East Coast branch office and a West Coast branch office might have the same Contact Set. Each branch office wants to synchronize data from their local Contact Set with the other office. The East Coast office names the Contact Set "Industrial"; the West Coast office names the same contact set "Manufacturing". As long as each office assigns the same Contact set code value to the local copy of the database, the offices can synchronize data.

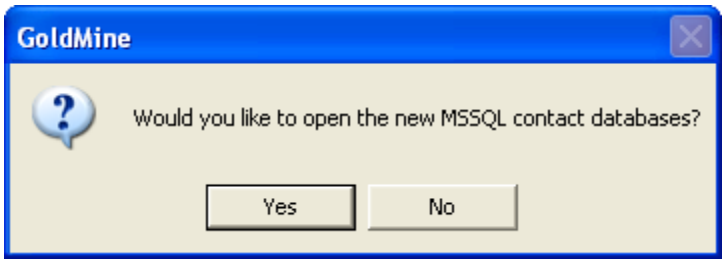
- Clear the **Allow database access only from this GoldMine installation** check box.

Note: Selecting this check box allows only the currently active GoldMine system (as determined by serial number) to log into the database. A GoldMine system with a different serial number cannot log into the database.

Click **Next**. The **Creating Database Files** dialog box appears.



Click **Finish**. The status dialog box appears. When complete, a message appears asking if you want to open this new database now.



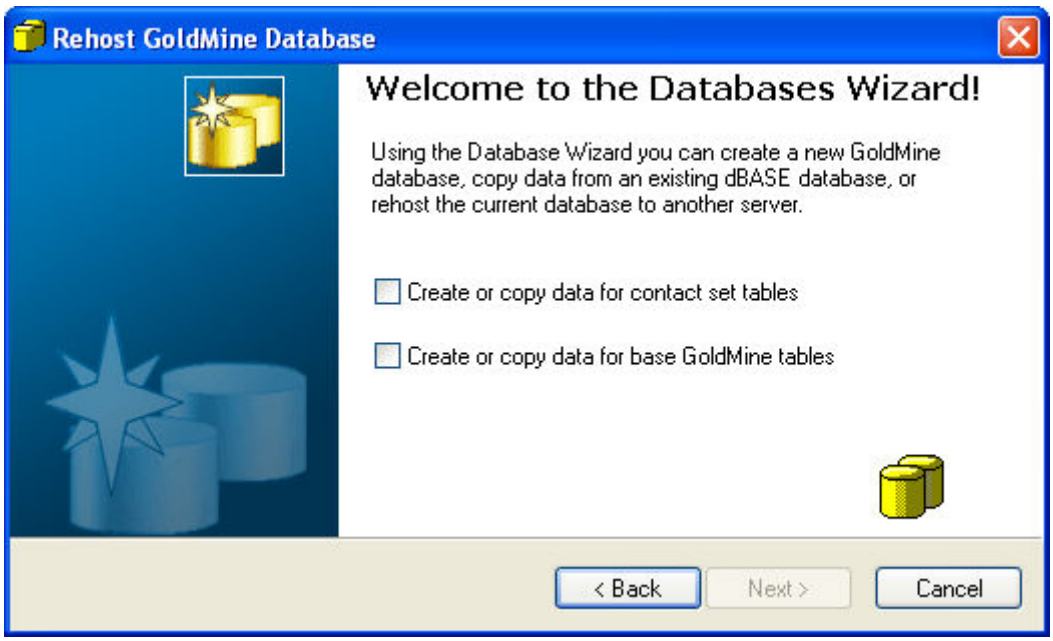
Click **No**.

Important: If you are creating a Firebird database and receive an error message (ODBC drivers are not present), install the ODBC driver first, then copy the **FBclient32.dll** to the GoldMine installation directory.

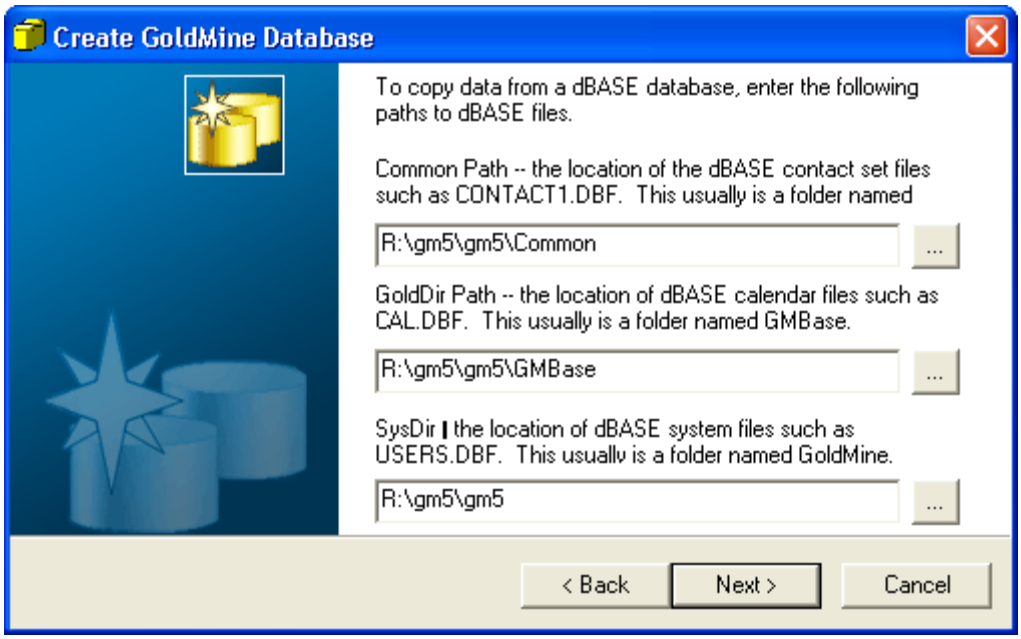
Copying Data from a dBASE Database

If, for example, you purchase a leads list and it is in a dBASE database, use the Databases Wizard to copy the data into your GoldMine database.

1. Select **Tools>>Databases>>New Database**. The **Welcome to the Databases Wizard** dialog box appears.
2. Type a description in the **Please enter the description of the new file** text box (such as, **Leads_05**).


Rehost GoldMine Database
Welcome to the Databases Wizard!
Using the Database Wizard you can create a new GoldMine database, copy data from an existing dBASE database, or rehost the current database to another server.
Create or copy data for contact set tables
Create or copy data for base GoldMine tables
< Back
Next >
Cancel

3. Select the **Copy data from a dBASE database** check box.
4. Click **Next**. The **Create GoldMine Database** dialog box appears.

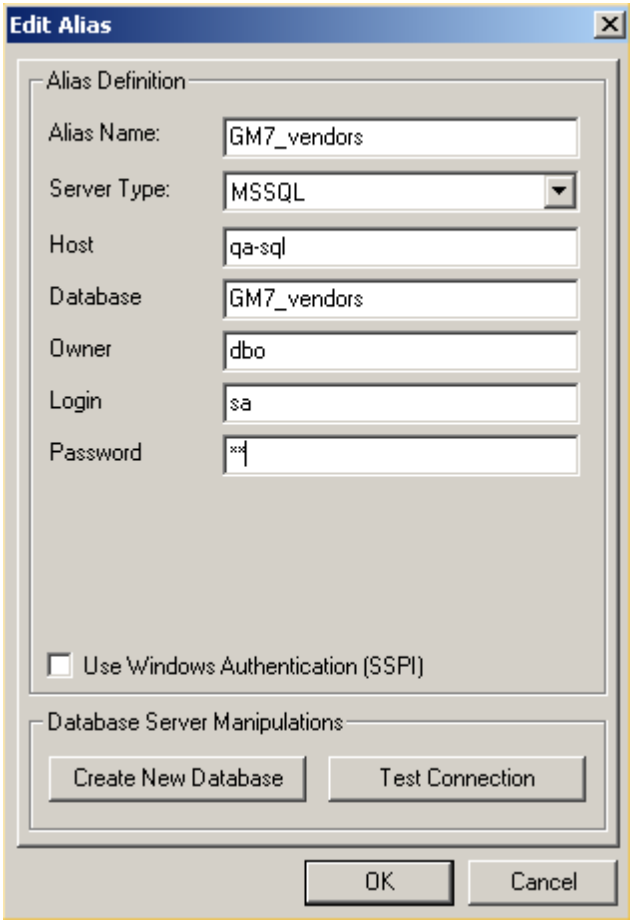

Create GoldMine Database
To copy data from a dBASE database, enter the following paths to dBASE files.
Common Path -- the location of the dBASE contact set files such as CONTACT1.DBF. This usually is a folder named
R:\gm5\gm5\Common
GoldDir Path -- the location of dBASE calendar files such as CAL.DBF. This usually is a folder named GMBase.
R:\gm5\gm5\GMBase
SysDir | the location of dBASE system files such as USERS.DBF. This usually is a folder named GoldMine.
R:\gm5\gm5
< Back
Next >
Cancel

5. Browse to the:

- **Common Path:** the location of the dBASE contact set files.
- **GoldDir Path:** the location of dBASE calendar files.
- **SysDir:** the location of dBASE system files.

6. Click **Next**. The **Create GoldMine Database** dialog box appears.
7. Click **Alias Manager**. The **Database Alias Manager** dialog box appears.
8. Click **New Database**. The **Edit Alias** dialog appears.

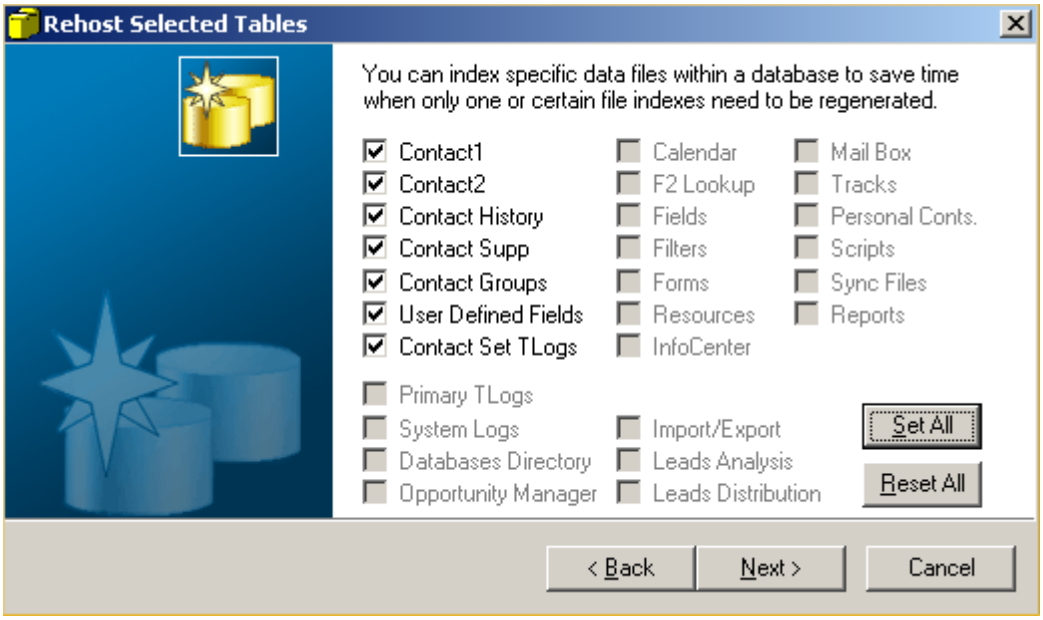
9. Complete the form:



- In the **Alias Name** text box, type **GM7_Leads**.
- From the **Server Type** drop-down list, select **MSSQL** (**MSSQL** and **Firebird** are available).
- In the **Host** text box, type the name of the computer hosting the database.
- In the **Database** text box, type **GM7_Leads**.

- In the **Owner** text box, type **dbo** (typical for MSSQL aliases).
- In the **Login** text box, type the username for the database (such as, **sa**).
- In the **Password** text box, clear the asterisks and type the password for the database (such as, **sa**).

10. Click **New Database** to register the alias. It notifies you if the alias was created successfully.
11. Click **OK**. The **Database Connections Manager** dialog box reappears.
12. Click **OK**. The **Create GoldMine Database** dialog box reappears.
13. Select the **Create a new contact database** check box to create a new Contact Set.
14. From the drop-down list, select **GM7_Leads**, the alias just created.
15. Accept the default **Rehost individual tables**.
16. Click **Next**. The **Rehost Selected Tables** dialog box appears.



17. Click **Set All**.
18. Click **Next**. The **Database Access** dialog box appears.
19. From the **Allow access to** drop-down list, accept the default **(public)**. This grants access to all users and groups.
20. In the **Contact set code** text box, type a unique value (such as, **GM7_L**).
21. Clear the **Allow database access only from this GoldMine installation** check box.
22. Click **Next**. The **Creating Database Files** dialog box appears.
23. Click **Finish**. The status dialog box appears. When complete, a message appears asking if you want to open this new database now.
24. Click **No**.

Creating SQL Databases

Creating a new SQL database is a three-stage process. Create the:

- SQL database shell
- Alias
- Database in GoldMine

Note: Follow the steps below to initiate the process, or use the Database Wizard. For detailed information, see your Microsoft SQL documentation.

1. From the Windows **Start** menu, select **Programs>>Microsoft SQL Server>>SQL Server Manager Studio**.
2. Expand the files under the **Console Root** to locate the correct server. Expand the server to locate **Databases**.
3. Right-click **Databases** and select **New Database**. The **Database Properties** dialog box appears.
4. In the **Name** text box, type the database name.
5. Click **OK**. The new database now appears in the database list.
6. Next, create an alias for the database in the Database Connections Manager.

Cleaning Up DOS Notes

You can replace garbage characters—primarily rectangles—that appear when GoldMine displays notes written in GoldMine for DOS.

Note: Working with this conversion does not affect the appearance of notes in GoldMine for DOS.

1. Select **File>>Import and Export>>Clean up DOS Notes**. The **Clean up DOS GoldMine Notes** dialog box appears.
2. To start the conversion, click **Go**.

Using the Global Replace Wizard

The **Global Replace Wizard** helps you replace the value of a field in the Contact Record.

Important: Before beginning a global replace, back up the GoldMine databases.

If using a global replace to operate on a subset of data, first build that subset with a filter or group you can then select during the process.

- Users without Master Rights cannot replace the **Owner** or **Status** fields.
- Apply global updates only to **Contact1** and **Contact2** fields.

1. Select **Tools>>Global Replace Wizard**. The **Global Replace Wizard** dialog box appears.
2. Select one option:
   - **Replace a Field with a value**
   - **Update a field using advanced options**
   - **Exchange the value of two fields**

Globally Replacing Fields with a Value

Use the **Replace a Field with a Value** option in the Global Replace Wizard to change the value of a field with another value.

1. Select **Tools>>Data Management>>Global Replace**. The **Global Replace Wizard** appears.
2. Select **Replace a Field with a Value**, then click **Next**.
3. Select a **Replace Field** in the drop-down list. This specifies the field to be updated. The data in this field will be replaced by the value specified in the With Value field. Select the GoldMine fields in the drop-down list.
4. Type or select from the F2 Lookup list the **With** Value to insert in the selected field. This Option specifies the replacement value that will be placed in the Replace Field. GoldMine will replace the specified field in all contact records with the value in this field. For example, if the Replace Field is *City*, and the With Value entry is *Long Beach*, GoldMine will replace all City entries with Long Beach.
5. Click **Next**.
6. Check the fields and replacement values before initiating the process:
   - **Expand partial contact records:** Expands partial contact records in the database into complete records if the field to be replaced is contained in the Contact2.dbf file. If the field is contained in Contact2.dbf, this option is selected by default. If you clear the Expand partial contact records option, partial records

are not expanded, and field values in these records are not updated. However, when additional entries require more space, GoldMine converts a partial record to a complete record. Clearing Expand partial contact records prevents GoldMine from automatically converting partial records during a global replacement.

- **Update linked fields (based on lookup.ini):** Changes values in linked fields according to the instructions in the [AutoUpdate] section of the Lookup.ini file. This option is available only if one or more selected fields include fields listed in Lookup.ini.
- **Log updates in history:** Records global changes to fields in the following System Logs:
- **Process Monitor Logs:** Displays the date, time, user, and number of records affected by the global replacement
- **Contact Files Logs:** Displays the date, time, user, field name, and the value inserted by the global replacement

Note: This option appears only if you selected Log updates in history for each field from the Field Label dialog box which you can access by pressing **CTRL** and double-clicking the field label.

7. You can globally replace more than one field at a time. To add another field and replacement value, click **Back**, .

Note: If you have more than one replacement entry, **Remove** becomes active. You can delete any entry other than a single entry.

8. Click **Remove** to delete the highlighted global replacement entry.
9. Click **Next**. The Global Replace Wizard displays a list of available filters and groups to apply to limit the records updated by the global replacement. The filter or group does not have to be activated prior to selection.
10. Select the filter or group to apply in the drop-down list, then click **Next**. The final **Global Replace** dialog box appears.
11. Click **Finish**.

Merging, Purging, and Deleting Records

About Merging and Purging

Users may accidentally create duplicate contact records in GoldMine that, over time, may be too great for manual deletion. GoldMine provides several methods for consolidating information and deleting duplicate records:

- **Merge/Purge Wizard:** Simplifies the replacement process by guiding you through the entire procedure.
- **Merge Visible Records:** Updates the contact record with input focus by merging information in two contact records displayed in GoldMine's work area.
- **Merge Tagged Records:** Creates one contact record by merging information from all tagged records.

Caution: Merging and purging permanently changes the database. We recommend backing up the database first.

Using the Merge/Purge Wizard

Use the Merge/Purge Wizard to select records based on a predefined profile or define your own criteria. Set up a custom merge/purge profile by defining:

- **Contact record fields:** Select as many as you want GoldMine to use during the evaluation process to match records.
- **Method:** Select a criterion for each record match which can be case sensitive, case insensitive, Soundex, or first n characters.
- **Weight:** Select and assign a numeric weight to each criterion. When a record is evaluated, each match with a criterion accrues the assigned weight value. If the total weight earned by matches between two records and the specified criteria equal or exceed the qualifying weight value, GoldMine selects the records as duplicates.

You can also select the method for disposing of duplicate records. Merge data from two duplicate records to create one updated record, or delete one of the duplicates according to a condition such as deleting the older record. Specify GoldMine process the merge/purge automatically, or display duplicate records for viewing or manual deletion.

Caution: Merging and purging permanently changes the database. We recommend you back it up before performing a merge/purge.

Note: We highly recommend selecting **Prompt me before merging records** and **Dry run: Only show duplicates—do not merge nor purge** before actually performing a purge.

1. Select **Tools>>Data Management>>Merge/Purge Records**. The **GoldMine Merge/Purge Wizard** appears.
2. Select one procedure:
   - **Merge/Purge using a predefined profile:** Displays the **Select a Merge/Purge Profile** dialog box containing a list of previously defined merge/purge profiles. Highlight the profile to use to search for duplicate records.
   - **Merge/Purge using new criteria:** Set up weighted criteria for the current merge/purge. The settings can be used one time only or saved as a merge/purge profile for future use.

3. Click **Next**.
4. If you selected **Merge/Purge using a predefined profile**, select the profile from the **Select a Merge/Purge Profile** dialog box. You can also delete a previously defined profile by selecting **Delete Profile**. After selecting a profile, click **Next.** The **Select a Filter/Group** dialog box appears.
5. If you select **Merge/Purge using new criteria**, the **Select a Filter/Group** dialog box appears.

Selecting the Merge and Purge Methods

The **Merge Method** and **Purge Method** dialog boxes contain settings that determine how GoldMine treats records selected as duplicates.

1. The **Merge Method** dialog box appears after selecting merge/purge criteria.
2. Select one merge method:
   - **Keep the record that was Created First:** Selects the Contact Record saved first. The date is determined by the entry logged in the Creation field of the Summary tab.

- **Keep the record that was Last Updated:** Selects the Contact Record changed last. The date is determined by the entry logged in the Last Update field of the Summary tab.
- **Create Linked Additional Contacts in each record:** GoldMine keeps both records and creates additional contacts in the Contacts tab of the duplicate records. For example, if GoldMine determines Jon Smith and John Smyth are duplicate contacts, Jon Smith is added as an additional contact in the John Smyth contact record. John Smyth is added as an additional contact in the Jon Smith contact record.

Note: Selecting **Create Linked Additional Contacts** does not prompt you for a purge method, but displays the **Save the Merge/Purge Profile** dialog box.

3. Select one:
   - **Create Additional Contact of non-surviving record:** The primary contact of the deleted duplicate record is stored as an additional contact in the surviving contact record. GoldMine stores the new additional contact in the Contacts tab of the surviving Contact Record.
   - **Prompt me before merging records:** Check this box for GoldMine to display duplicate records and offer options so the user can make individual decisions on each set of duplicate records.
   - **Dry run: Only show duplicates—do not merge nor purge:** Check this box for GoldMine to display duplicate records without any options to select records for purging. At the end of the process, duplicate records remain in the contact database.

Note: If you select Dry run, GoldMine does not prompt you for a purge method, but displays the Save the Merge/Purge Profile dialog box.

IMPORTANT: We highly recommend selecting Prompt me before merge records and Dry run: Only show duplicates—do not merge or purge before actually performing a purge.

4. After selecting a merge/purge option, click **Next**. Unless creating linked additional contacts or performing a dry run, the **Purge Method** dialog box appears.
5. Select one option:
   - **Delete the duplicate record:** GoldMine automatically deletes records meeting the qualifying weight specified in the merge/purge profile.
   - **Update a field with a value to indicate record deletion:** Changes the specified field with a specified value—selecting this option does not purge duplicate records.

Tip: Selecting **Update a field with a value to indicate record deletion** is the safest way to merge/purge records. This option performs the merge based on your criteria and then marks the non-surviving record but leaves it in your database. Review the records and delete based on the value with which the specified field is updated.

6. Click **Next**. The **Purge Method: Update Field Settings** dialog box appears:
   - **Update Field:** Select the field in the drop-down list.
   - **Value:** Type the value you are updating the field with to indicate deletion. If any record had an entry in the specified field, this data overwrites the existing value.

7. Select **Merge Calendar, History, and ContSupp records** to move this data to the surviving Contact Record from the purged record. This option moves data from these records:

- **Calendar**
- **History**
- **Additional contact**
- **Referral**
- **Detail**

8. Click **Next**. The **Save the Merge/Purge Profile** dialog box appears.

Merging Visible Contacts

You can merge two or more visible contact records. The active Contact Record is updated with information from the other record. The non-active contact is deleted.

1. Select **Window>>New Contact Window**. A second contact window opens.
2. Display the second record you are merging. Make the record you are keeping in the database the active Contact Record.
3. Select **Tools>>Data Management>>Merge/Purge Records>>Merge Visible Records**. The **Merge/Purge Visible Contact Records** dialog box appears.
4. The dialog box reminds you that the active Contact Record will survive. Information from the other records will be consolidated on the surviving record, and the other records will be deleted.
5. Click **Yes**.

Merging Tagged Records

You can consolidate information from all tagged contact records into one contact record.

IMPORTANT: GoldMine updates the first tagged contact record and deletes all other tagged contact records.

1. Tag the records to merge.
2. Select **Tools>>Merge/Purge Records>>Merge Tagged Records**. The **Merge/Purge Tagged Contact Records** dialog box appears.
3. The dialog box reminds you that the first record tagged will be the surviving record with data from the other records consolidated on that one record. Once consolidated, the other records are deleted.
4. Click **Yes**.

Using the Delete Wizard

To update your contact database by deleting some or all Calendar records, history records, and/or Contact Records, use GoldMine's Delete Wizard to reduce the possibility of an unintentional deletion.

Note: Only users with Master Rights can access the Delete Wizard.

1. Select **Tools>>Data Management>>Delete Records**. The **Delete Wizard** appears.
2. Select one delete option:
   - **Delete old history records:** Purges old history data from the contact database. Delete all history records from the contact database, or activate a filter or group, then use this option to delete history records from the subset of records.

Note: Removing old history records periodically can significantly reduce the amount of disk space used by contact sets.

- **Delete ALL (filtered) contact records:** Deletes a subset of records from the contact database based on a filter or group.

2. Click **Next**. If you selected **Delete old history records** or **Delete ALL**, the select filter/group dialog box appears.

About Territory Realignment

Use GoldMine to reassign large groups of contacts and scheduled activities from one user to another. Use the **Territory Realignment Wizard** to manage dynamic sales territories, assign existing contacts to a new sales representative based on user-defined criteria, or change the contact base for a sales representative reassigned to a different territory. Then select settings for synchronization, updating the databases of sales representatives working in the field.

Use the Territory Realignment Wizard to:

- Assign a set of existing contacts to users based on a filter or group
- Reassign activities from one user to another user
- Globally update fields relevant to a territory realignment
- Set up synchronization to update the databases of remote users affected by the realignment

Important: We strongly recommend you back up data before performing territory realignment.

Note: To reassign contacts and scheduled activities, build a filter or group containing the contacts associated with the sales territory to be realigned. If no filter or group exists, create one now.

By default, GoldMine tracks and stores the filtered records included in the last synchronization session's transfer set for a remote site based on the Territory Realignment. By performing this filter qualification process, GoldMine automatically includes records with changes affecting Territory Realignment in the current synchronization session. This ensures the remote sites update on the next synchronization.

Using Copy/Move Records

Move a single record or a group of contact records to another database. The Copy/Move options within GoldMine let you do this while maintaining synchronization integrity. Copy/Move is a synchronization process. To copy or move only some of the records, build the appropriate filter or group first.

Important: Back up your database before moving data.

For example, move contacts into an archive database, or copy records from a leads database to a customer database once the lead becomes a customer.

1. Select **Tools>>Data Management>>Copy/Move Records**. The **Copy/Move Records Between Contact Sets** dialog box appears.
2. From the **Select Target Contact Set** drop-down list, select the destination database. The records copy or move from the open database.

3. In the **Record Selection** area, select either:
   - **Current Record:** Copies or moves the active contact record.
   - **Group of Contact Records:** Copies or moves all records in the filter or group selected from the drop-down list.

4. In the **Transfer Method** area, select either:
   - **Copy Records:** Creates a duplicate of the records in the target contact set. The duplicate records have the same account numbers as the original records, and all associated notes, history, additional contacts, detail, and referral records also copy.
   - **Move Records:** Moves records from the current Contact Set to the target file. Records delete from the original file.

Tip: We recommend using the copy feature only. Copy and verify the data in the new contact set, and delete the data in the originating data set.

5. If you selected Move Records, select **Sync Deletions** to mark moved records as deleted. Selecting this option marks the Tlogs for the records as deleted and GoldMine does not recognize attempts by another GoldMine system to resynchronize the records.
6. Click **Details** to read a description of the **Sync Deletions** option.
7. Click **Go**. The Copy/Move begins. The **Process Monitor** displays progress in the process.

Database Maintenance

About Maintaining Databases

GoldMine includes a database Maintenance Wizard that generates indexes, rebuilds and packs the data, and sorts and verifies the database. Indexing ensures data integrity and quick access to the data in indexed fields. Rebuilding and packing creates fresh data files and builds tables, and then repacks the database, minus the deleted records. Sorting the database orders database files by the most-used indexes. Verifying data ensures it is readable, that the fields in the synchronization records are populated and readable, and that unique fields are not duplicated.

- Indexing Databases
- Rebuilding and Packing Databases
- Sorting and Verifying Databases

Important: Only the GoldMine administrator should use the maintenance features. If not used correctly, these operations can cause data loss.

Warning: Before maintaining the database, always do a full backup of your database. This guarantees you can restore the database if something interrupts the process. For example, a power outage or network failure during the process could cause data loss.

Only one user should be logged into the GoldMine system during maintenance operations. Before the maintenance begins, GoldMine ensures no other user is accessing that data. Once the operation is in progress, GoldMine prevents other users from accessing the system by renaming the **License.bin** to **License.bix**. When maintenance is completed, the license renames back to **License.bin**.

To monitor what database maintenance has been initiated, view the Maintenance Logs.

Backing Up Databases

If you encounter a problem while working in GoldMine that causes data loss or data corruption, the problem may be internal or external to your system. Ensure data availability in the event of data loss or corruption using a regular program of data backup.

- Backing Up SQL Databases
- Backing Up Firebird Databases

To maintain an optimal backup system, make a separate backup on each day for a 2-week cycle. That is, your backup system should include 10 to 14 individual backups. Two weeks of backups are recommended because data corruption may not be discovered for several days. Only 1 or 2 backups may contain corrupted data. Use tape or diskettes as a backup medium.

For added security and recovery, keep a backup in secure offsite location (a bank deposit). Ensure you periodically update the backup.

Note: Maintain regular backups of GoldMine contact data, setup data, and program files. To back up contact data in GoldMine on an MSSQL database, use a utility designed to back up SQL data.

Indexing Databases

Whether you are using Firebird or SQL, indexes may become lost or corrupt.

Note on Preventing Corrupt Indexes

1. Select **Tools>>Databases>>Maintain Databases**. The **Welcome to the GoldMine Maintenance Wizard** dialog box appears.

Note: Depending on the size of your database, indexing the entire database can be time-consuming. Select **All Database Files** if you are indexing the entire database. To index a particular table, select **Individual Files**.

2. Select:
   - **Current Contact Set Files:** Indexes only the contact files/tables in the currently open contact database. If you select Current Contact Set Files, the **Rebuild, Sort and Verify Database Files** dialog box appears.
   - **Individual Files:** Specifies which files/tables in the GoldMine directory and in the open database that GoldMine indexes. If you select Individual Files, the **Maintain Selected Tables** dialog box appears.
   - **All Database Files:** Indexes and rebuilds contact files/tables in the open contact database, and those contained in the GoldMine system directory. If you select All Database Files, the **Maintain All Database Files** dialog box appears.

Note: Select **Automatic Maintenance** to configure GoldMine to automatically perform indexing and rebuilding. The Automatic Maintenance dialog box appears.

3. Click **Next**.
4. Based on previous selection:

- If **Individual Files**, from the Maintain Selected Tables dialog box, select the table or tables to be indexed. Click **Next**.
- If **All Database Files**, from the Maintain All Database Files dialog box, select **Files in GoldMine Directory** and **Current Contact Set Files.** Select All Contact Set Files to index other contact databases. Click **Next**.

5. The **Rebuild, Sort and Verify Database Files** dialog box appears. To perform a simple indexing, do not select the options. Click **Next**.
6. From the GoldMine Maintenance Wizard dialog box, select **Force all users to exit GoldMine within *x* minutes**. Set the number of minutes. A message is sent to the currently logged in users telling them the GoldMine Administrator is performing maintenance, to complete their work, and close GoldMine.
7. Click **Finish**. GoldMine deletes the current indexes for the selected table or tables, and creates new ones.

Restoring SQL Databases

To use the SQL restore utility, find the SQL Server Enterprise Manager and right-click the database name. Select **All Tasks>>Restore Database**. The **SQL Server Restore** dialog box appears. Select the backup file to restore and click **OK**. The **Restore Progress** window shows the restoration process status.

Sorting and Verifying Databases

Sort reorders records in the tables based on the most-used indexes. **Verify** checks data for readability. It checks to see if all fields in the synchronization records of the database files are populated and for any duplication of unique fields.

Important: Always back up your database before maintaining GoldMine.

1. Select **Tools>>Databases>>Maintain Databases**. The **Welcome to the GoldMine Maintenance Wizard** dialog box appears.
2. Select:
   - **Current Contact Set Files:** Includes currently open contact files. Does not include GoldMine files, such as Calendar, Lookup, or Mailbox.
   - **Individual Files:** Lets you select individual tables from both the currently open contact files and the GoldMine files.
   - **All Database Files:** Lets you select GoldMine files, current Contact Set, or all contact sets.
   - **Automatic Maintenance:** Lets you configure automatic maintenance options (regular maintenance without user intervention).

3. Click **Next**. The dialog box that appears varies based on previous selection (each box eventually opens the **Rebuild, Sort and Verify Database Files** dialog box).
4. Select **Rebuild and Pack the database files**. If using GoldMine with a SQL database, a warning message appears reminding you SQL tables do not need rebuilt.
5. If appropriate, select **Sort the database files**
6. If appropriate, select **Verify the data and synchronization information**.
7. Click **Next**.
8. From the GoldMine Maintenance Wizard dialog box, select **Force all users to exit GoldMine within *x* minutes**. Set the number of minutes. A message is sent to the currently logged in users telling them the GoldMine Administrator is performing maintenance, to complete their work, and close GoldMine.

9. Click **Finish**.

Using the GoldMine Maintenance Wizard

Configure these maintenance options:

- **Indexing:** Ensures data integrity and quick access to the data in indexed fields.
- **Rebuilding and Packing**: Creates fresh data files and builds tables, then repacks the database minus deleted records.
- **Sorting and Verifying: Sort** reorders records in the tables based on the most-used indexes. **Verify** checks data for readability. It checks to see if all fields in the synchronization records of the database files are populated and for any duplication of unique fields.

Important: Always back up your database before maintaining GoldMine.

1. Select **Tools>>Databases>>Maintain Databases**. The **Welcome to the GoldMine Maintenance Wizard** dialog box appears.
2. Select:
   - **Current Contact Set Files:** Includes currently open contact files. Does not include GoldMine files, such as Calendar, Lookup, or Mailbox.
   - **Individual Files:** Lets you select individual tables from open contact files and GoldMine files.
   - **All Database Files:** Lets you select GoldMine files, current Contact Set, or all contact sets.
   - **Automatic Maintenance:** Lets you configure automatic maintenance options (regular maintenance without user intervention).

3. Click **Next**. The dialog box that appears varies based on previous selection (each box eventually opens the **Rebuild, Sort and Verify Database Files** dialog box).

Setting Up Automatic Maintenance

Configure GoldMine to automatically maintain the database based on specified criteria.

1. Select **Tools>>Databases>>Maintain Databases**. The **Welcome to the GoldMine Maintenance Wizard** dialog box appears.
2. Select **Automatic Maintenance**.
3. Click **Next**. The **Automatic Maintenance** dialog box appears.
4. Select the **Logged User** (designates the user with Master Rights responsible).

Note: The **Logged User** must be logged into GoldMine at the specified start time and day for the automatic maintenance to run.

4. Type or select the **Start Time**. Click the right arrow to access the F2 graphical clock.

Note: Because GoldMine forces all network users to log out of GoldMine during indexing and rebuilding, index after regular business hours.

5. In the **Maintain Files** box, select a file to maintain.

Note: Maintain Calendar File and Sync Log Files often (rebuild and pack weekly).

6. Select the **Frequency**.
7. Select:
   - **Pack, rebuild and index:** Indexes, rebuilds, and packs the selected files.
   - **Index only:** Only indexes the selected files. Available only for the GoldMine Files, Current Contact Set, All Contact Sets, and System Logs.

8. Select **Save**.
9. View the Maintenance Logs to verify the process has run successfully.

Important: If you maintain a SQL database with the Wizard, you must reset table permissions. Be aware you may lose data in the Contact2 table if you have more than 233 user-defined fields.

Viewing System Logs

GoldMine records system activity for a variety of operations in System Logs. To view a system log, select **Go To>>Logs>>GoldMine Logs**. The left pane displays the log types and the right pane displays the details. To see details, expand the log type until you locate the day to view. Select the day; details appear in the right pane.

The **System Logs** window displays these log types:

- **Process Monitor Logs:** Activities recorded in the GoldMine Process Monitor.
- **Maintenance Logs:** Dates and outcomes of database maintenance procedures.
- **Users' Login Logs:** Users' login activity.
- **Sync Wizard Logs:** Dates and details for GoldMine synchronization.
- **GoldSync Logs:** Details about GoldSync synchronization.
- **Contact Files Logs:** Changes made to the Contact Set files.
- **GoldMine Files Logs:** Changes made to GoldMine files.
- **Error Logs:** Details of errors.

Use the logs for troubleshooting. To prevent performance problems, periodically purge the logs.

Importing and Exporting Data

About Importing Data

GoldMine provides several ways to import data. Use the GoldMine Import Wizard to import data from other applications into GoldMine using predefined profiles or by creating your own profiles using the wizard. A predefined utility is included for importing from ACT!.

Import data into GoldMine from these database sources:

- **DBF file**
- **ASCII file**
- **SDF file**
- **SQL file**

GoldMine also provides a wizard for importing data from an XML file.

About Exporting Data

The exporting process copies data into a formatted file the receiving application understands. The Export Wizard provides simplifies the task. Using the Export Wizard, create a data file from GoldMine records according to criteria in a predefined profile, or define your own profile. GoldMine can export from the current database in three formats:

- **DBF file**
- **ASCII (TXT) file**
- **SDF (fixed length) file**

Also export data to an XML file.

Considerations for Importing and Exporting Data

When importing and exporting data:

- Only fields in the Contact1 and Contact2 tables and the primary e-mail and Web site Details are available for standard import or export. The XML import and export lets you import or export the full database.
- Merge information and check for duplicates while importing.
- Save import and export profiles to facilitate the process. A profile is predefined field mappings and specifics of data file locations.
- GoldMine supports the importing and exporting of calendar, history, and supplemental contact information when using the predefined ACT! import profile or XML.

When importing or exporting, all fields are referenced by their GoldMine field names, which may differ from their label name. Once created, the field name never changes, though the label may be changed by the user.

For example, the field Key1 located in the Contact1 table is commonly labeled Contact Type. This means the field would be listed as Key1 and not as Contact Type in the lists of GoldMine fields in the import and export wizards. This is important because you may not recognize the field name as the field you wish to use.

Note: If your import requirements include calendar, supplemental contact information, or history records, use third-party utilities to import. Several products designed to work with GoldMine are GoldBox Utilities, Inaport, CRMSwitch, and Beyond Gold. As third-party products, they are not supported by FrontRange Solutions technical support.

Data Preparation

Before importing, establish the source file and destination file components. Do not start the importing procedure until you create necessary fields in GoldMine.

Taking the source file, create a list of all of the field names and lengths, then manually match the GoldMine field and its length. If the fields do not exist or are not long enough, make structural changes to the fields before proceeding. The data should be in ASCII, SDF, SQL, or DBF format for importing.

Caution: Failure to save the file correctly could result in loss of data.

Using the Import Wizard

1. Select **File>>Import and Export>>>>Import Contact Records**. The **Welcome to GoldMine's Import Wizard** dialog box appears.
2. Select one option:
   - **Import a new file:** Incoming data formats according to the profile you define in the Import Wizard. You can save the profile for future use.
   - **Import a new file using an existing profile:** If importing:

- DBF, ASCII, or SDF, select a profile you created on the Select File to Import dialog box.
- DBF, select an ACT profile or one you created.
- ASCII or SDF, select a profile you created.
- from SQL, the **Select SQL Table to Import** dialog box appears.

3. Select one option for the file type to import.
   - **DBF file:** Incoming data is in dBASE file format. Fields in a dBASE file are referred to by field name, for example, the Company field might be referred to as COMPANY, and the Contact field might be referred to as CONTACT.
   - **ASCII file:** Incoming data is in delimited text file format. A delimited text file formats data with field delimiters, field separators, and record separators. In the delimited ASCII format, fields are referred to by their position in the record.
   - **SDF file:** Incoming data is in a text file with fixed-length record format which is commonly used by mainframe computers. Fields in the SDF format are referred to by starting and ending character positions.
   - **SQL file:** Incoming data is from an SQL table.

4. Click **Next**. The dialog box that appears depends on the options you selected:
   - **Import an new file** from DBF, ASCII, or SDF, the **Import a New File** dialog box appears.
   - **Import a new file** from SQL, the **Import a New SQL Table** dialog box appears.
   - **Import a new file using an existing profile** from DBF, ASCII, or SDF, the **Select File to Import** dialog box appears.
   - **Import a new file using an existing profile** from SQL, the **Select SQL Table to Import** dialog box appears.

Using the Export Wizard

1. Select **File>>Import and Export>>>>Export Contact Records**. The **Welcome to the GoldMine Export Wizard** dialog box appears.
2. Select one export option:
   - **Export to a new file:** GoldMine exports the data according to the settings defined in the Export Wizard. You can save the new settings for future use.
   - **Export to a new file using an existing profile:** Displays the **Select Export Profile** dialog box where you select a predefined profile GoldMine will use to format the data for export.

3. Select the file type to exporting into:
   - **DBF file:** Specifies data will export in the dBASE file format. Fields in a dBASE file are referred to by field name; for example, the Company field is called COMPANY, and the Contact field is called CONTACT.
   - **ASCII (TXT) file:** Specifies data will export in the delimited text file format. A delimited text file formats data with field delimiters, field separators, and record separators. In the delimited ASCII format, fields are referred to by their position in

the record. For example, company name is field 1, contact name is field 2, and so on.

- **SDF (fixed length) file:** Specifies data will export to a text file with fixed-length record format which is commonly used by mainframe computers. Fields in the SDF format are referred to by starting and ending character positions.

4. Click **Next**. If you selected:
   - **Export to a new file**, the **Select Filter/Group** dialog box appears.
   - **Export to a new file using an existing profile**, the **Select Export Profile** dialog box appears.

Importing and Exporting XML Files

About Importing and Exporting XML

Import and export GoldMine contact data to or from an Extensible Markup Language (XML) format. XML is a meta language used to facilitate the easy exchange of data between systems using different applications. Importing or exporting your GoldMine data as an XML file helps you share information with different applications, such as contact management systems, that support XML.

Like HTML, XML uses tags (words bracketed by < and >) and attributes (name = "value"). However, XML provides more flexibility when interpreting the tags and values. For example, HTML specifically defines the meaning of each tag and attribute as well as the appearance of the tagged text when displayed in a browser; XML uses tags only as data delimiters, leaving the interpretation to the receiving application.

Note: When exchanging data with other GoldMine systems, be sure to synchronize with GoldMine instead of sharing exported data. Synchronization provides features unavailable when you export data as an XML file, including cutoff dates to limit the date range of data and the capability to exchange updates to additional contact data and calendar data.

Use the **GoldMine XML Import Wizard** to import data from an XML file. The wizard takes you through the process and lets you save the settings in a profile to reuse.

Use the **GoldMine XML Export Wizard** to export your contact data as an XML file. The wizard guides you through the procedure. All the data you export is placed in one file that the recipient can import and use as a"key" to map the imported data into the recipient's database.

Exporting to XML

Export GoldMine contact data to Extensible Markup Language (XML) format. XML is a meta language is used to facilitate the exchange of data between systems using different applications. Exporting your GoldMine data as a .xml file helps you share information with recipients using a different contact management application supporting XML. Data exported is placed in one file the recipient can import and use as a "key" to map the imported data into the recipient's database.

(View part of a sample XML export)

```
- <accounts>
  - <account gm_recid="00000009I{{{>2R" gm_accountno="ELAN SOFTWARE CORP.">
    - <properties>
      - <property name="Accnt Mngr" db_name="KEY4">
          <property_string>C.Stott</property_string>
        </property>
      - <property name="Actionon" db_name="ACTIONON">
          <property_string>20021109</property_string>
        </property>
      - <property name="Address" db_name="ADDRESS1">
          <property_string>1150 Kelly Johnson Boulevard</property_string>
        </property>
      - <property name="Asst" db_name="SECR">
          <property_string>Jane</property_string>
        </property>
      - <property name="Business" db_name="KEY2">
          <property_string>Comp. Sfw. Dev.</property_string>
        </property>
      - <property name="Callbkfreq" db_name="CALLBKFREQ">
          <property_string>0</property_string>
        </property>
      + <property name="City" db_name="CITY">
      - <property name="Company" db_name="COMPANY">
          <property_string>FrontRange Solutions Inc.</property_string>
        </property>
      - <property name="Contact" db_name="CONTACT">
          <property_string>Patrick B. Hillyard</property_string>
        </property>
      - <property name="Contact Type" db_name="KEY1">
          <property_string>Internal</property_string>
```

Note: When exchanging data with other GoldMine users, synchronize with GoldMine instead of sharing exported data. Synchronization provides features unavailable when you export data as an XML file, including cutoff dates to limit the date range of data as well as the capability to exchange updates to additional contact data and calendar data.

1. Select **File>>Import and Export>>>>Export GoldMine Data to an XML File**. The **GoldMine XML Export Wizard** appears.
   - **Export to a new XML file:** Displays the **Select GoldMine Data for Export** dialog box. GoldMine exports the data according to a profile created as you define settings in the **GoldMine XML Export Wizard**. You can save the new profile for future use.
   - **Export to a new XML file using an existing profile:** Displays the **Select Profile** dialog box to select a predefined profile GoldMine will use to format the data for export.

2. Make a selection and click **Next** to advance to the **Select GoldMine Data for Export** dialog box (new .xml file) or **Select Profile** dialog box (select an existing profile).

Importing XML

GoldMine can import contact data and user activities from an XML file. The GoldMine XML schema dictates how data is arranged within the XML file in order for GoldMine to recognize

contacts, calendar activities, and other data when importing into GoldMine. The XML file you importing into GoldMine must conform to the GoldMine XML schema for the field mapping to work. You can use XSL Transformations (XSLT) to transform XML source documents to GoldMine-compliant XML documents.

Note: For more about XSLT, see www.w3.org/TR/xslt

Create an XML transformation sheet converting the XML file to match the GoldMine schema. Then import the data into GoldMine.

Example: Your XML source schema has the contact's first name in one field and the last name in another field. Because the GoldMine schema requires the first and last names to be in the same field, you must create a transformation sheet merging the two fields in your source XML file. Once your source file matches the GoldMine schema, you can import the XML data into GoldMine.

Tips:

To view the GoldMine schema, export your GoldMine data to an XML file and include the schema. Open the file in Internet Explorer and view the schema.

To create a transformation sheet and transform the data, use Notepad or an XML transformation utility.

Example of the first few lines of a GoldMine schema:

```
<?xml version="1.0" encoding="utf-8" ?>
- <xs:schema xmlns:xs="http://www.w3.org/2001/XMLSchema"
    targetNamespace="http://www.frontrange.com/goldmine/xmlexport"
    xmlns="http://www.frontrange.com/goldmine/xmlexport" version="1.0">
  - <xs:element name="gmdata">
    - <xs:complexType>
      - <xs:sequence>
          <xs:element ref="header" minOccurs="1" maxOccurs="1" />
          <xs:element ref="accounts" minOccurs="0" maxOccurs="1" />
          <xs:element ref="unlinked_content" minOccurs="0"
            maxOccurs="1" />
        </xs:sequence>
      </xs:complexType>
    </xs:element>
  - <xs:element name="header">
    - <xs:complexType>
      - <xs:sequence>
          <xs:element ref="goldmine_version" minOccurs="1"
            maxOccurs="1" />
          <xs:element ref="gmdbdef" minOccurs="0" maxOccurs="1" />
        </xs:sequence>
      </xs:complexType>
    </xs:element>
    <xs:element name="goldmine_version" type="xs:string" />
  - <xs:element name="gmdbdef">
    - <xs:complexType>
      - <xs:sequence>
          <xs:element ref="gmdbfld" minOccurs="0"
            maxOccurs="unbounded" />
        </xs:sequence>
      </xs:complexType>
    </xs:element>
```

1. Select **File>>Import and Export>>>>Import GoldMine Data from an XML File**. The **GoldMine XML Import Wizard** appears.
2. Select one option in the **GoldMine XML Import Wizard**:
   - **Import a new file:** Displays the **Import a New File** dialog box. GoldMine imports the data according to a profile created as you define settings in the GoldMine XML Import Wizard.
   - **Import a new file using an existing profile:** Displays the **Select File to Import** dialog box to select a predefined profile GoldMine will use to format the data you import from.

3. Click **Next** to advance to the **Import a New File** dialog box or the **Select File to Import** dialog box.

Importing from Other Applications

Importing Data from ACT!

GoldMine offers an import wizard to help convert ACT! data to GoldMine. Select an import method based on the ACT! version you are importing from.

- If importing from ACT! 6.x , select **File>>Import and Export>>Convert from ACT! 6.0**. The **Welcome to the ACT! Import Wizard!** appears.
- If importing from ACT! 2000 or ACT! 4 and lower, select **File>>Import and Export>>Import Contact Records**. The **Welcome to GoldMine's Import Wizard** appears.

Using the Outlook Conversion Wizard

The Outlook Conversion Wizard provides an easy way to convert your Outlook files (Contacts, Calendar, Tasks, and E-mail folders) to GoldMine. This is useful when moving information from Outlook to GoldMine as your business contact management system. The conversion wizard is an import feature and is not to be used in lieu of Outlook synchronization.

Note: Outlook contact and calendar notes with rich text formatting and embedded URLs import into GoldMine as plain text.

1. Select **File>>Import and Export>>>>Convert from Outlook**. The **Outlook Conversion Wizard** dialog box appears.
2. Click **Next**. The **Import Options** dialog box appears.
   - **Apply GoldMine's Formatting to phone numbers being imported:** Converts the Outlook format—commonly (719) 555-5555) to GoldMine—commonly (719)555-5555.
   - **Select the username...:** Select the user in the drop-down list who will become the owner of the records and who the calendar and history activities will be assigned to.
   - Select one duplicate checking option:
   - **Do not import duplicate records:** Does not import any records where the company, contact, and phone fields in Outlook match a GoldMine record.
   - **Import all record to GoldMine:** Imports all selected records into GoldMine without checking for duplicate records.

4. Click **Next**. The **Contact Folder(s)** dialog box appears.
   - To select Contact folders to import, click **Add**. The **Select Folder** dialog box appears. Select a contact folder to import and click **OK**. Repeat the process for each contact folder to import.
   - Click **Remove** to delete a highlighted folder on the Contact Folder(s) dialog box.
   - If not importing any contact folders, click **Next** without adding folders to the Folder list.

5. Click **Next**. The **Calendar Folder(s)** dialog box appears.
   - To select Calendar folders to import, click **Add**. The **Select Folder** dialog box appears. Select a calendar folder to import and click **OK**. Repeat the process for each calendar folder to import.
   - Click **Remove** to delete a highlighted folder on the Calendar Folder(s) dialog box.
   - If not importing any calendar folders, click **Next** without adding folders to the Folder list.

6. Click **Next**. The **Calendar Options** dialog box appears.

- To set the date range of calendar records you are importing, select number of days, months, years before today for the **Starting** date, and the number of day, month, or year before today for **Ending** date.

7. Click **Next**. The **Task Folder(s)** dialog box appears.
   - To select Task folders to import, click **Add**. The **Select Folder** dialog box appears. Select a task folder to import and click **OK**. Repeat the process for each task folder to import.
   - Click **Remove** to delete a highlighted folder on the Task Folder(s) dialog box.
   - If not importing any task folders, click **Next** without adding folders to the Folder list.

8. Click **Next**. The **E-mail Folder(s)** dialog box appears.
   - To select E-mail folders to import, click **Add**. The **Select Folder** dialog box appears. Select an e-mail folder to import and click **OK**. Repeat the process for each e-mail folder to import.

   Note: Imported e-mail folders and Inbox messages are categorized and filed in the E-mail Center in a separate Outlook Import folder.

   - Click **Remove** to delete a highlighted folder on the E-mail Folder(s) dialog box.
   - If not importing any e-mail folders, click **Next** without adding folders to the Folder list.

9. Click **Next**. The **Ready to Import** dialog box appears.
10. Click **Back** to change any settings.
11. Click **Finish**.

Exporting to GoldMine From Microsoft Excel

Once **GoldMine Plus for Microsoft Office** is installed, data can be exported from Microsoft Excel to your GoldMine database using new menu options in Excel.

GoldMine Plus for Office adds an export feature to the GoldMine menu in Excel. Use this menu option to map Excel columns to GoldMine fields and initiate the export process.

Important! Backup your database before beginning.

Note: Before proceeding with the export, verify that phone numbers are formatted consistently and make changes as needed. The format of the phone numbers in your Excel spreadsheet must be the same for the Excel ODBC to interpret the numbers correctly. If formats are inconsistent, the ODBC driver interprets all the values in the column as null and you lose phone number data during the export process. For example, you cannot have one phone number that is 1235557894 and another that is 777-555-1236. Before exporting to GoldMine, specify one format and update all phone numbers in your spreadsheet to match the selected format. When the phone number format is consistent, begin exporting to GoldMine.

1. Launch **GoldMine**.
2. **Open** the Excel spreadsheet you are exporting to GoldMine.
3. Select the cells you are exporting to GoldMine and specify the Named Range. In Excel, select **Insert>>Name>>Define**. The **Define Name** dialog box appears. **See Excel Help for details**.

Note: To perform this function in **Microsoft Office 2007**, select the cells to export to GoldMine, right-click on the selected cell range and select **Name a Range** from the drop-down menu. You may also select the **Formulas tab**, then select **Define Name>>Define Name...** from the **Defined Names** sub-menu.

4. In the **Names** text box, type the desired name of the range.

Note: The first row of the selected range must contain only header data.

5. Select either **Workbook** or **Sheet** from the **Scope** drop-down menu.
6. Select **GoldMine>>Export Data to GoldMine**. The **Export Data to GoldMine** dialog box appears.
7. The **Welcome to the GoldMine Plus for Microsoft Excel Export Wizard!** appears.
8. Click **Next**. The **field mapping** dialog box appears.
9. To map columns to GoldMine fields, highlight the **column** in the **Excel Fields** list and then highlight the **GoldMine field** to map the column to. Click **Add Mapping**. Your selection is added to the **Mapped Fields** list (for example, **Column1<=>C1.Company**).
10. Continue to map desired fields. When finished, click **Next**. The **GoldMine is now Ready to export your Excel data!** dialog box appears.
11. Click **Finish**. When the import process completes, a dialog box appears, indicating the number of records imported into GoldMine.

Importing and Exporting iCalendar Files

Importing iCalendar Files

1. Select **File>>Import and Export>>Import from an iCalendar file**. The Windows **Open** dialog box appears.
2. Locate the iCalendar (*.ics) files to import and click **Open**. The **Import from an iCalendar file** dialog box appears.
3. To import a single iCalendar activity, select the activity and click **Import**.

Note: When importing iCalendar files from Lotus Notes, GoldMine schedules activities without assigned participants , or "invitees," as unlinked. Identify this situation whenever the Organizer entry is UNKNOWN.

4. To import all activities, click **Import All**.
5. As each activity is processed, the **Attach imported activity to contact** dialog box appears. Select one option:
   - Find an existing contact and then link this activity.
   - Find an existing contact, create a new additional contact and link to it.
   - Create a new contact and then link this activity.
   - Do not link this activity to any contact

6. Click **OK**. Depending on the option selected, different windows and dialog boxes appear.
7. Click **Close**.

Exporting iCalendar Files

Export iCalendar files so users of iCalendar-enabled applications, such as Microsoft Outlook or Lotus Notes can import activities from your iCalendar file to their calendars.

1. Select **File>>Import and Export>>>>Export to an iCalendar file**. The **Export to an iCalendar file** dialog box appears.
2. In the **Select based on Contact(s)/User(s)** area, select one:
   - Activities based on Contact(s): Exports activities scheduled for the current Contact Record, or for records based on the selected filter.

   Select from:

   - **Current Contact record:** Exports the information for the current record.
   - **Filters/Groups:** Exports information based on the filter or group selected in the drop-down list.
   - Activities based on the User(s): Exports activities scheduled for selected users.

   Select the any or all users' activities to export.

3. In the **Selection Criteria** area, select the activity types to export.
4. To narrow the export to a range of dates, select **Date range** and select the **From** and **To** dates on the F2 graphical calendar.
5. Click **Export**. The Windows **Save As** dialog box appears.
6. Locate the folder to save the files to and type the **File Name**. Verify the **Save as type** is **iCalendar format (*.ics)**.
7. Click **Save**. The **GoldMine Process Monitor** appears displaying the progress of the export.

WebImporting

About WebImporting

Set up Internet Web sites to collect contact information from interested visitors. Use the data in GoldMine by creating a Web form that includes instructions for handling the data.

Once information is submitted, a Web server script can format the data into an Internet e-mail message which can then be sent to a designated recipient. When **retrieving the e-mail message**, GoldMine recognizes the import instructions and creates a Contact Record with data captured from the Web page. Or, if a WebImport contact duplicates an existing contact, update selected fields.

Combining the WebImport feature with GoldMine's **Automated Processes** can automate capturing and responding to leads. Initiate Automated Processes automatically and send e-mail messages to GoldMine users alerting them of the incoming contact data.

(Using the WebImport Wizard)

An advanced knowledge of gateway scripts is not needed to implement the GoldMine WebImport feature. Begin by contacting your Web administrator and providing him or her with the sample HTML and Perl script. Writing and modifying scripts requires some programming expertise not covered in this material. Many sources for getting started with Common Gateway Interface (CGI) scripts are available on the Internet and in bookstores.

Note: FrontRange Solutions' technical support cannot provide support for creating or maintaining HTML code or CGI scripts.

Lookup.ini Basics

About the Lookup.ini

Lookup.ini does not exist in GoldMine until you create it using a text editor. It writes as a standard configuration file, similar to the **Win.ini** and **System.ini** files and stores in the GoldMine directory.

Lookup.ini performs functions based on a trigger and resulting action:

- Update a Contact1 or Contact2 field based on an entry in another Contact1 or Contact2 field.
- Update Contact1 or Contact2 field based on an expression.
- Launch an external application based on an expression or the occurrence of a specified field entry.
- Apply an activity color code to calendar activities based on either an activity type, an activity code, or both.
- Launch an external application when a new record is created.

Note: If the Lookup.ini script updates a field based on updates to another field, the update of the second field does not follow the update access security for the second field set in the **Field Properties** dialog box. Example: use a Lookup.ini to update Key2 based on updates to Key1. The user has update rights to Key1, but not to Key2 – but can update Key1 and the Lookup.ini updates Key2.

Lookup.ini includes:

- **[AutoUpdate]:** Specifies trigger fields (fields that create an update if modified) and the resulting field to be updated. The second section comprises the specific instructions and parameters used when updating the GoldMine field.
- **[OnNewRun]** and **[OnEditRun]:** Determines the external application to launch when a new record is created (a contact record or a supplemental file record adding a new calendar activity).
- **[CalClrCode]:** Specifies the color to assign to the activity being scheduled.

Examples:

Entering Data in One Field Updates Another

A company requires that the Salesperson field, **USalesRep**, automatically update **[AutoUpdate]** when the GoldMine user typing data populates the City field.

The **Lookup.ini** is headed **[AutoUpdate]**. It is where the trigger and update fields are defined in the format: **Trigger field=Update field**.

There is no need to prefix field names with a database (Contact1->City) because no two fields in the Contact1 or Contact2 data files (except AccountNo) have the same field name.

This example is automatically updating field data.

```
[AutoUpdate]
```

```
City=USalesRep
```

When the trigger field **(City)** is updated, the **Lookup.ini** evaluates the subroutine of the same update field name **(USalesRep)**. The result of this evaluation determines what is entered into the **USalesRep** field.

In this example, the subroutine **(USalesRep)** contains a reference to the trigger field **(City)** and a list of potential values that could be contained within the **City** field **(Seattle, Aspen, Kansas City)**.

```
[USalesRep]
Lookup1=Contact1->City
Seattle=Janice Parks
Aspen=Danny Davis
Kansas City=Ken Linden
```

If a match is found, for example, the **City** field contains **Seattle**, **Lookup.ini** populates the **USalesRep** field with **Janice Parks** (**Seattle=Janice Parks**).

For every possible entry in the **City** field, a Lookup must be listed if it is to update another field.

Checking a Sequence of Fields to Update Field

A company requires the Salesperson field **(USalesRep)** automatically update when the GoldMine user entering data populates the **City** field. If no city is matched, the **State** field (or other geographic boundary) must be evaluated so a second attempt is made at populating the **Salesperson** field.

Apply a second Lookup command. If GoldMine cannot match the City field with one of the listed values, it moves on to the next Lookup, which in this case is **State**. If required, a maximum of 9 different Lookups can be defined.

```
[AutoUpdate]
City=USalesRep
[USalesRep]
Lookup1=Contact1->City
Seattle=Janice Parks
Aspen=Danny Davis
Kansas City=Ken Linden
Lookup2=Contact1->State
WA=Janice Parks
CO=Danny Davis
MO=Ken Linden
```

If the **City** field does not contain **Seattle**, **Aspen**, or **KansasCity**, the **State** field is evaluated.

If the **State** returns a value of **CO**, the **USalesRep** field populates with **Danny Davis**. Set every parameter to update the field correctly.

If no Match is Found

A company requires the **Salesperson** field **(USalesRep)** automatically update **[AutoUpdate]** when the GoldMine user typing data populates the **City** field. If no state is entered or if an erroneous entry is made, the Salesperson field updates with **Unallocated**.

The **Lookup.ini** can update a field with a set entry if no matches are found. The otherwise statement is included after all Lookups 1-9 are listed.

If the **City** field does not contain **Seattle**, **Aspen**, or **KansasCity**, **USalesRep** populates with **Unallocated**.

```
[AutoUpdate]
City=USalesRep
[USalesRep]
Lookup1=Contact1->City
Seattle=Janice Parks
Aspen=Danny Davis
Kansas City=Ken Linden
Otherwise=Unallocated
```

Updating Two Fields from One Trigger Field

A company requires the **Salesperson** field **(USalesRep)** and the **Region** field **(URegion)** populate when the **City** field populates.

The trigger field launches two subroutines rather than one. Note the **[AutoUpdate]** section containing a reference to both fields, separated by a comma, and the existence of two separate subroutines.

The order of referencing is important if one field must be updated first because its new value affects the entry in the second field.

If updating both the **City** and the **Salesperson** field affected the update of the **Region**, the **USalesRep** section must be referenced first under **[AutoUpdate]**.

If updating the **Region** and the **City** would affect the **Salesperson**, the **URegion** field must be referenced first in the **[AutoUpdate]** section. If the fields are to be updated independently, either can be referenced first.

```
[AutoUpdate]
City=USalesRep, URegion
[USalesRep]
Lookup1=Contact1->City
```

```
Seattle=Janice Parks
Aspen=Danny Davis
Kansas City=Ken Linden
[URegion]
Lookup1=Contact1->City
Seattle=Northwest
Aspen=Mountain
Kansas City=Midwest
```

If the Field to Update is Pre-Populated

GoldMine does not automatically overwrite an existing value in a field to be updated unless it specified to do so. The **OverWrite** statement is a toggle statement (**On/Off** or **True/False**). If:

- **Overwrite=0:** Existing values in the update field are not overwritten.
- **Overwrite=1:** Existing values in the update field are overwritten.

The statement is placed at the end of the subroutine.

```
[AutoUpdate]
City=USalesRep
[USalesRep]
Lookup1=Contact1->City
Seattle=Janice Parks
Aspen=Danny Davis
Kansas City=Ken Linden
Otherwise=Unallocated
OverWrite=1
```

Update a Field Based on an Expression

The **Lookup.ini**, by way of expression, returns an actual value to a field that can be used like every other field within GoldMine. The **[AutoUpdate]** section contains a trigger field and a reference to a subsection to execute.

The subroutine contains an expression rather than a list of returned values from a Lookup1; however, the subroutine must be written in a standard way, and therefore a dummy Lookup1 must be inserted—although it is set to not return any values—so the Otherwise command is invoked.

Use the expression with the **Otherwise** command, but prefix it with an ampersand (&).

The Calculation of Numeric Fields

A Company has quarterly sales figures (**USales Qtr1-USalesQtr4**) for each customer. It requires a Total (**UTotal**) field summing business quarters one through four and returns a

value.

The **[AutoUpdate]** section includes four trigger fields: **Usales Qtr1-4**. When any one of these fields updates, the **Lookup.ini** runs the subroutine **UTotal**.

The **Lookup1** command looks in a placeholder field. In the example, **Contact1->Company** is referenced. No values are listed under Lookup1; therefore, no match is found. The **Lookup.ini** progresses to the **Otherwise** command.

```
[AutoUpdate]
UsalesQtr1=UTotal
UsalesQtr2=UTotal
UsalesQtr3=UTotal
UsalesQtr4=UTotal
[UTotal]
Lookup1=Contact->Company
Otherwise=&(Contact2->UsalesQtr1+Contact2
->UsalesQtr2+Contact2->UsalesQtr3+
Contact2-> UsalesQtr4)
Overwrite=1
```

Calculation Fields Using Decimal Places

For the **Lookup.ini** to calculate a value that includes a decimal place, each field referenced when calculating must contain the same amount of decimal places whether needed.

The **Otherwise** command must include a String statement (**STR**) in order to calculate to x decimal places.

```
[AutoUpdate]
UsalesQtr1=UTotal
UsalesQtr2=UTotal
UsalesQtr3=UTotal
UsalesQtr4=UTotal
[UTotal]
Lookup1=Contact->Company
Otherwise=&STR(Contact2->UsalesQtr1+Contact2->UsalesQtr2+Contact2-
>UsalesQtr3+Contact2->UsalesQtr4,2,10)
Overwrite=1
```

The **Otherwise** statement ends in **2,10** where **2** indicates the number of decimal places and **10** the length of the field.

Averaging Blank and Filled Fields Using Hypothesis Values

If the **Otherwise** command holds an expression that calculates the sum of the contents of all fields, then divides the total by the number of fields, those empty fields (set to zero) are also included.

```
Otherwise=&((Contact2>Ufield1+Contact2->Ufield2+Contact2-
>Ufield3)/3)
```

If the field values were:

- **10**, **20** and **30**, the **Lookup.ini** returns a value of **20** (**60** divided by **3**).
- **10**, **20** and **0**, the **Lookup.ini** returns a value of **10** (**30** divided by **3**).

Inclusion of the blank or zero fields may be inappropriate. In our example the final calculation should be divided by **2** not **3**, resulting in an average of 15.

True/False fields calculate using an if statement followed by the value indicating whether the value is true, then are suffixed with a value to replace if true, and then a value to replace if false:

```
(iif(field=value,true[x],false[y]))
```

The expression **otherwise=&(iif (contact2 ->ufield1=0,0,1))** states the value in **Ufield1** should equal **0**. If it does (true), the **count** field populates with **0**. If the field is not equal to **0** (it contains either a higher or lower value), the count field populates with **1** for false (not true). Each field evaluated must have its own count field.

The **Utotal** section then calculates the sum of all counter fields and uses that figure to divide the total of the fields **Ufield1-Ufield3**.

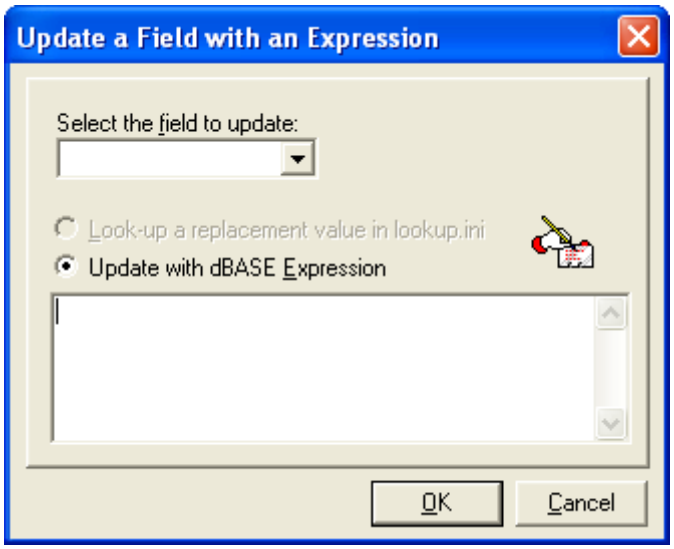
The programming standard of **0 = false** and **1 = true** has no bearing in this example.

```
[AutoUpdate]
UField1=ucount1, utotal
UField2=ucount2, utotal
UField3=ucount3, utotal
utotal=utotal
[ucount1]
Lookup1=contact1->company
otherwise=&(iif(contact2->ufield1=0,0,1))
Overwrite=1
[ucount2]
Lookup1=contact1->company
otherwise=&(iif(contact2->ufield2=0,0,1))
Overwrite=1
[ucount3]
```

```
Lookup1=contact1->company
otherwise=&(iif(contact2->ufield3=0,0,1))
Overwrite=1
[UTOTAL]
Lookup1=contact1->company
otherwise=&((contact2->ufield1+contact2> ufield2+contact2-
>ufield3)/(contact2> ucount1+contact2->ucount2->+contact2> ucount3))
Overwrite=1
```

Update a Field with an Expression Dialog Box

View



1. From the drop-down list, **select the field to update**.
2. Select **Look-up a replacement value in the Lookup.ini** if you have an existing subsection in the Lookup.ini that updates this field.
3. Select **Update with dBASE Expression** and type a dBASE expression in the text box. Example, "Updated 5/15/2003".
4. Click **OK**.

Using Calendar Color Codes

Lookup.ini can assign colors to activity types (such as calls and appointments) and activity codes. The Activity type (**RecType**) must be specified with the activity code (optional) and the color to be assigned. These details store under a section in **Lookup.ini** called **[CalClrCode]**.

The **RecType** field is held in the Calendar and History databases and defines the type of activity record in those databases.

Calendar RecTypes

Rec Type	Description	Rec Type	Description
A	Appointment	C	Call Back
T	Next Action	D	To-Do
M	Message	S	Forecasted Sale
O	Other	E	Event

Calendar Color Codes

Code	Color	Code	Color
0	Bright Blue	8	Gray
1	Bright Purple	9	Red
2	Bright Red	10	Green
3	Bright Cyan	11	Yellow
4	Bright Green	12	Blue
5	Bright Yellow	13	Purple
6	Cyan	14	Dark Gray

7	White	15	Black

Example: Appointments are bright green **(A=4)**. Calls are bright purple **(C=1)**. Appointments with an activity code of HOT are bright yellow **(A-HOT=5)**. Calls with an activity code of CCA are bright red **(C-CCA=2)**.

```
[CalClrCode]
A-Hot=5
C-CCA=2
A=4
C=1
```

Firebird

About Firebird

Firebird is an open source relational database offering many ANSI SQL-99 features. It runs on Windows, Linux, and a variety of Unix platforms. It offers excellent concurrency, high performance, and powerful language support for stored procedures and triggers.

- This database management system is now an option for GoldMine users and provides you with a more robust solution to database needs and performance. Previous systems limited customization and integration, were prone to corruption, and structure changes were difficult to introduce.
- The switch to Firebird also lets you use the Microsoft technology ActiveX Data Objects (ADO). ADO enables programmatic access to database, supports multiple databases, and requires MDAC 2.6.
- You selected Firebird as a database choice during installation. If you accepted the defaults during installation, the data base name is **GoldMine.FDB** (all Firebird databases have this extension) and it is located in **Program Files>>GoldMine>>GoldMine>>Data**. The username is **SYSDBA** and the password is **masterkey**. The password can be changed after installation.
- GoldMine lets you migrate data from your previous dBASE system, so valuable information is not lost. See the **GoldMine Installation Guide** or support.frontrange.com for steps about migration.

See www.ibphoenix.com and www.firebirdsql.org for additional information.

Administration

Firebird comes with an ISQL command line tool. There are also free tools to help you administrate, such as those available from FlameRobin, FeniSQL, and IBExpert. The **Firebird Quick Start Guide** provides essential details and is available online, including from www.firebirdsql.org.

See also: Changing the Firebird Password.

Changing the Firebird Password

We recommend that, following installation of Firebird, you change the Firebird Server default username and password.

Obtain Downloads

Obtain the Firebird installation files, ODBC driver, and installation documentation online at http://www.firebirdsql.org/.

Requirements

We recommend you use SuperServer on Windows.

Changing the Default Username and Password

Note: Refer to http://www.firebirdsql.org/ for detailed information.

The SYSDBA user has all privileges on the server. Depending on version, OS, and architecture, the installation program will either:

- Install the SYSDBA user with the password masterkey (actually, masterke; characters after the eighth are ignored).
- Ask you to enter a password during installation.
- Generate a random SYSDBA password and store that in /opt/firebird/SYSDBA.password.

If your server is exposed to the Internet at all and the password is masterkey, you should change it immediately using the **gsec** command-line utility. Firebird comes with a command-line tool called **gsec** that is used to manipulate user accounts.

Important: With some Firebird installations, you can only run gsec if you are logged into the operating system as Superuser (root on Linux) or as the user the Firebird server process runs under. On Windows server platforms, you typically need to be in the Power User group or higher to run gsec successfully.

If you have enough privileges but invoking gsec results in a message like **Unavailable database - unable to open database**, you are either running Windows Classic Server and you did not provide a correct -database argument (see below), or the server may not be running at all. In that case, test your installation and fix the problem.

Example: Change the SYSDBA password to icuryy4me

1. Open a command shell on your server and navigate to the directory where the command-line utilities are located. Refer to the Firebird installation components table to find this location.
2. Type the following command (except if running Windows Classic Server):

   ```
   gsec -user sysdba -password masterkey
   ```

   If using Windows Classic Server, you must specify the full network location of the security database:

```
gsec -user sysdba -password masterkey -database
"localhost:C:\Program Files\Firebird\Firebird_1_5\security.fdb"
(adapt the path if necessary)
```

On Linux, type **./gsec** rather than gsec to avoid not finding or launching the improper gsec.

Note: Paths and file names are case-sensitive on all platforms except Windows; passwords are always case-sensitive.

Look for the shell prompt for the gsec utility:

```
GSEC>
```

3. Type this command:

```
modify sysdba -pw icuryy4me
```

4. Press Enter. The new password **icuryy4me** is now encrypted and saved and **masterkey** is no longer valid.
5. Quit the gsec shell:

```
quit
```

Note: Because Firebird ignores all characters in a password past the eighth character, icuryy4m will work, as will icuryy4monkeys.

Administrative Tools

The Firebird kit does not come with a GUI admin tool. It does have a set of command-line tools — executable programs located in the **bin** subdirectory of your Firebird installation.

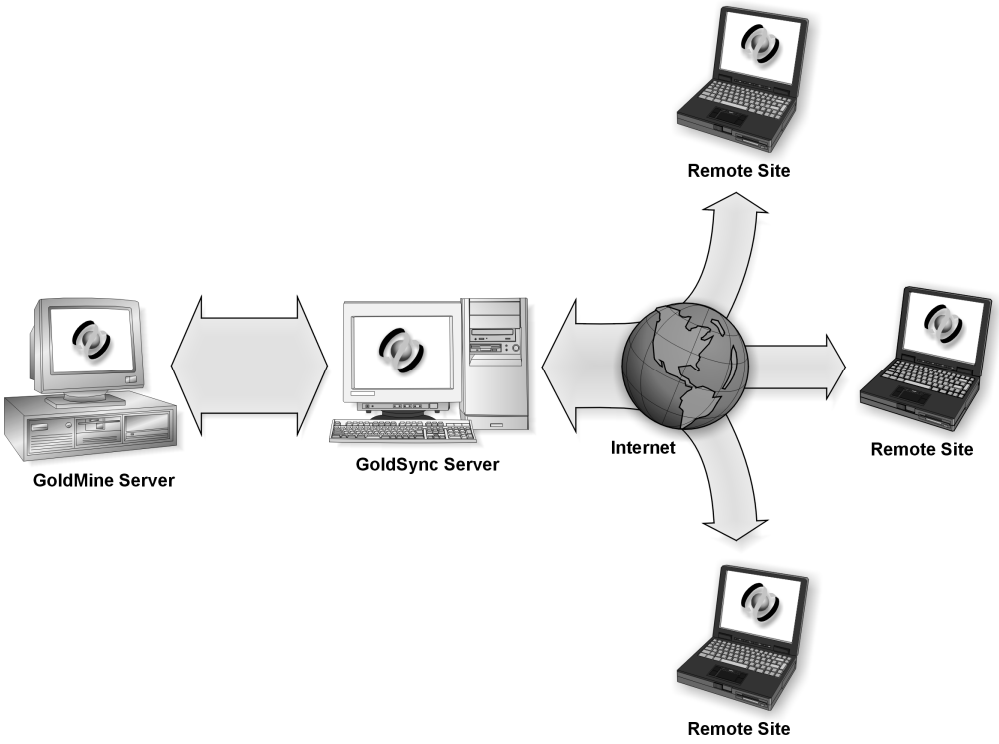
The range of excellent GUI tools available for use with a Windows client machine is too numerous to describe here. A few GUI tools written in Borland Kylix, for use on Linux client machines, are also in various stages of completion.

Using GoldSync

About GoldSync

GoldSync provides unattended and automated remote synchronization for 2 or more GoldMine systems. GoldSync remote synchronization includes multilevel security and administrative controls and enhanced flexibility over GoldMine's one-to-one remote synchronization.

(GoldSync Key Terms and Concepts)



GoldSync licenses are included with GoldMine Premium Edition and can be added to your GoldMine Personal Edition D-license. Contact your Solutions Partner for details.

GoldSync can simultaneously update multiple GoldMine systems with added or changed information in other GoldMine systems. Messages and Calendar updates can be sent to as many users as are configured for the synchronization.

Although most users are not responsible for configuring or maintaining GoldSync, they may be required to synchronize their GoldMine with a GoldSync server. If so, they can use the GoldMine Synchronization Wizard to set up and run a GoldSync profile with settings provided by their GoldSync administrator.

GoldSync administrators choose connection methods, session intervals, and the sending/retrieving data options that work best for their remote-to-host scenarios.

Tip: To maximize potential for success, we recommend that a certified GoldSync administrator perform administrative duties.

(Planning a GoldSync System)

Systems using GoldSync to synchronize enjoy the added convenience of One-button Sync with GoldSync Server synchronization. Users can employ click-and-go synchronization using a profile defined by the GoldSync administrator. In some cases, users can install GoldMine and the One-button synchronization profile in one operation.

GoldSync Key Terms and Concepts

- **Host Site:** The GoldMine system accepting incoming connections from one or more remote sites. The site running GoldSync with the Master license typically is called as the host site.
- **Remote Site:** A GoldMine system initiating a connection to the host site. A remote site typically is an undocked user or branch office with a sublicense.
- **Site Group:** A group of remote sites sharing common configuration settings. These settings define which data synchronizes, who sends/receives the data, how often the data synchronizes, and the method of data transport.
- **Site Group Members:** The individual sites belonging to a site group. While the site group members inherit properties of the site group, an individual site group member can also have its own unique settings.
- **Site Code:** An identifier limiting connected and initiated processes and nonconnected processes to only those sites with matching site codes. The site code is assigned to both the process and the site(s).
- **GoldSync Server:** Any network computer GoldMine is installed on and where synchronization processes run. More than one GoldSync Server on a network is allowed. A GoldSync Server is a host site or a remote site depending upon whether it accepts or initiates connections.
- **Processes:** The synchronization tasks performed on a GoldSync Server. Processes pack, send, and retrieve the data. Each process can initiate multiple tasks.
- **Transfer Set:** A file comprising all the changes made in a GoldMine database during a specified time frame, including new Contact records and updates to existing Contact Records. Transfer sets can include changes down to the field level for each type of information stored.

Note: The transfer set does not contain all historical changes made to a GoldMine database. It includes records starting with the most recent and spans only to include database changes since a specified cutoff date.

- **Contact Set:** A database of Contact Records.
- **File Code:** A unique identifier used to distinguish one Contact Set from another. File Codes are defined in the main GoldMine application. (Select **File>>Open Database**, select the **Contact File**, and click **Properties**.) When the File Code is set, the Contact Set is available for selection in the Synchronization Wizard and the GoldSync Administration Center. The remote system must have a matching File Code.
- **RecID:** The unique identifier for every record in GoldMine. This value is compared during synchronization to determine if there is a matching record in the respective databases if it is a first-time synchronization or if there are no logs.
- **GoldSync Administration Center:** The command center where synchronization settings are configured. The GoldSync Administration Center lets you administer multiple sites and automate the processing of transfer sets and connection management.

After the system administrator configures GoldSync, no further operator intervention is required. the GoldSync Administration Center handles dialing, redialing, and information transfers for remote GoldMine sites.

- **GoldSync Synchronization Wizard:** The tool used by remote sites to manually define configuration settings and initiate synchronization sessions with the host site.
- **One-button Synchronization:** Lets remote users synchronize with GoldSync with a single click. The administrator sets up a one-button sync profile for the remote user in the GoldSync Administration Center.

GoldSync Implementation Considerations

To understand how to make synchronization part of your business process, analyze:

- The anticipated number of records in the database.
- The volume of changes you expect to make to the data.
- Whether the entire database or a filtered subset of data is to be synchronized with remote sites.
- The number of remote sites.
- Whether the sync model is dynamic (several synchronizes per site per day) or static (once per week for reporting and data archive purposes).
- The expected future growth of the overall implementation (additional records/databases, users, remote sites).

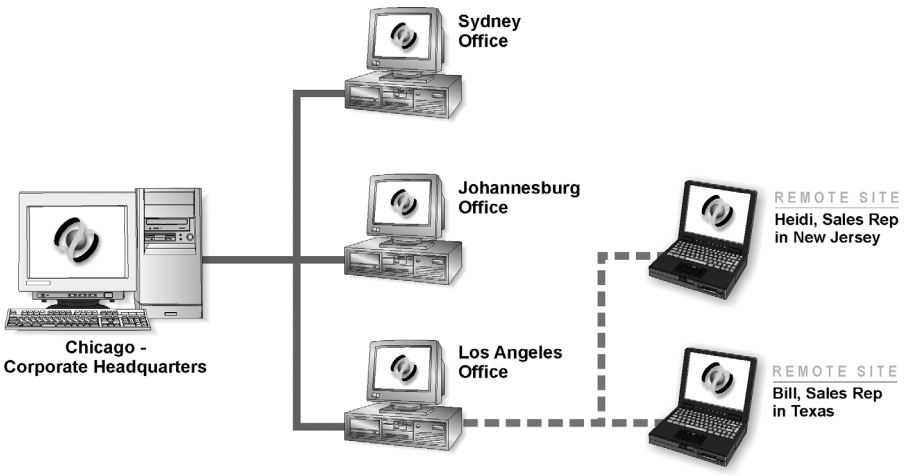
To understand the technology issues, consider:

- Bandwidth currently available between potential remote sites and all synchronization servers.
- Future plans for enhancing bandwidth (for example, VPN, corporate WAN, and so on).
- Firewall and network security may limit synchronization options.
- Personnel resources available to administer and maintain synchronization.

Planning a GoldSync System

Analyze information needs, resources, and challenges presented by geography, time zones, or other factors. GoldSync accommodates a variety of configurations.

First, map a diagram of the GoldSync setup to show requirements for accomplishing business goals and providing a reference during final implementation.



Determine individual needs of the different remote sites. In the sample diagram, the Chicago office creates three site licenses with the appropriate number of seats. Sydney and Johannesburg need at least one GoldSync license each to synchronize with Chicago. Los Angeles needs one GoldSync license for synchronizing with Chicago and two more GoldSync licenses to create two remote sites for Heidi and Bill, who synchronize with Los Angeles; and Los Angeles, Johannesburg, and Sydney synchronize with Chicago.

Planning Variables:

The GoldSync administrator must identify variables to evaluate when installing GoldSync.

Because the amount of data and load an organization may require of GoldSync varies, no simple way exists to determine if a computer's configuration or network infrastructure effectively serves GoldSync's processing requirements. GoldSync's requirements change as variables change.

- **Operating System:** The GoldSync server performs a considerable amount of intensive processing, so the GoldSync administrator must ensure the system acting as the GoldSync server can consistently sustain the demands of heavy load processing. Select a system that is stable, reliable, and scalable. We strongly recommend administrators install and deploy GoldSync on Windows 2003 Server.

  The key benefit of determining the differences is to understand how this variable affects planning for the SQL Server implementation with GoldSync. Also, different operating system versions offer varying levels of support for memory and processing capabilities.

- **Microsoft SQL Server:** Microsoft SQL Server 2005 is the only SQL Server currently supported by GoldMine Premium Edition. Understanding how SQL Server is configured and managed is critical to GoldSync's successful deployment.
- **Memory Usage:** Microsoft SQL Server 2005 requires more RAM than earlier versions because the redesigned query optimizer using hash and merge takes more in-memory processing.

  The more memory available, the better caching capability SQL Server has for loading the database into memory, and for performing queries in memory.

  Operating systems may impose limits on the amount of memory any application can use. Administrators must know key differences between various versions and editions of the Windows NT-based systems to effectively determine what memory capabilities are available to SQL Server.

- **Disk I/O Subsystem Performance Can Affect SQL Server's Performance:** Because SQL Server tries to cache as much information as it can into memory, at some point, available RAM will likely be insufficient to hold all the information—especially when running queries on large databases. Consequently, virtual memory is used, which may result in decreased performance.

  I/O performance becomes critical in sustaining heavy read/write activities. The physical disk subsystem must provide the database server with sufficient I/O processing power for the database server to run without disk queuing.

- **SQL Server Profiler and SQL Server Performance Monitor:** Tools such as SQL Profiler and SQL Server Performance Monitor can help administrators with performance tuning. SQL Server Profiler provides detailed information about activity occurring on the database server. Its logs are useful when troubleshooting SQL error messages and symptoms with applications issuing queries on the databases hosted to SQL.
- **Resources, Data, and Load:** These variables can have a significant impact on GoldSync's functionality and performance. They have an interdependent relationship, making it difficult to plan a GoldSync implementation without accounting for all three.

Note: After determining the amount of data and load the GoldSync Server must process, determine the hardware requirements. Look at the organization's infrastructure to determine the limitations it may impose on the overall GoldSync implementation.

- **Selecting a GoldSync System Server:** Depending upon the amount of data and load, the GoldSync server may need to perform intensive processing. We recommend a dedicated GoldSync Server.

Systems serving as SQL Servers and acting as servers for other applications or systems running resource-intensive applications are not good candidates for GoldSync Servers.

Although GoldSync functions on systems meeting minimum requirements, we recommend—especially when running multiple sites—administrators deploy GoldSync on systems using at least a Windows 2003 operating system with at least 256 MB of RAM and with a processing power of a Pentium II-350. A safe guideline is to install as much memory as the computer can hold, especially in the case of single-processor computers.

The overall load the GoldSync server processes influences GoldSync's performance. The more data GoldSync processes through concurrent tasks, the more processing power it requires from the computer it runs on.

The location of the GoldMine executable GoldSync uses has no observed bearing on GoldSync's performance. To simplify management and troubleshooting, we recommend administrators run the same executable for GoldSync while the main GoldMine server is running.

- **Setting Maximum Simultaneous Synchronization Sessions:** Hardware components such as processor speed, memory, and disk subsystem available, affect the number of simultaneous synchronization sessions the GoldSync server can handle.

FrontRange recommends no more than 10 simultaneous synchronization sessions per GoldSync server. This applies to connected and nonconnected sync methods and can fluctuate due to dependency on variables such as the amount of data each site needs to process and the processing power of the GoldSync and SQL Servers.

- **Determining the Need to Use Multiple GoldSync Servers:** Process more than 10 sites concurrently by setting up multiple GoldSync Servers. This procedure is synonymous to load balancing, where application tasks are distributed to multiple systems to increase and leverage the computing power that cannot be realized through a single, dedicated GoldSync Server.

You may not realize any potential load-balancing benefits if conflicting limitations from the SQL Server's capability exist. The number of simultaneous GoldSync processes is always physically constrained by the SQL Server. See Microsoft's SQL Server documentation on Performance Tuning.

- **Setting the Synchronization Period:** Schedule a time when the GoldSync server can handle processes. By assigning a time for sites to synchronize, the administrator is assured the server can handle the processing load without needing to physically monitor the system.

Administrators can access GoldSync's Process Properties to use the Sync Period setting on the group member's properties.

- **Selecting a Synchronization Connection Method:** FrontRange recommends administrators implement the IP to IP/Network method because:

1. Configuration is simple. Administrators specify the address (numeric or name) of the GoldSync computer the remote is connecting to.
2. It works well with common network security options—especially firewalls. GoldSync uses 5993 as its default port where the network administrator can configure a port on its firewall to receive and send packets of data securely. This method offers the flexibility of assigning another port number to receive the GoldSync connection.
3. It is the most reliable transport method when using the TCP/IP protocol. The TCP/IP protocol guarantees the retransmission of dropped packets—typically due to network problems. Additionally, it ensures each packet received has the same content as when it was sent. (If a bit changes or drops for some reason, the protocol detects this and retransmits the packet.)
4. IP to IP/Network is easier to troubleshoot. A Telnet procedure is usually the only tool needed to confirm a problem with the IP to IP/Network method.

Example: With e-mail synchronization, there is no way to verify a transfer set was retrieved by a remote site with the e-mail sync method because e-mail synchronization is a nonconnected procedure. GoldSync updates the cutoff date for the next synchronization session after successfully creating a transfer set even if the remote site fails to retrieve that transfer set. This may leave gaps in the remote's data in a situation where a transfer set was not successfully retrieved due to a condition external to GoldSync/GoldMine.

- **Designing a Plan to Reduce Processing Time:** When using a connected method for synchronization, reduce processing time by:
- Creating transfer sets in advance.
- Using filters and groups to limit the amount of data in the transfer set.
- Using multiprocessor systems. GoldSync takes advantage of the high-performance computing power Windows NT-based technology provides.

Configuring Send Options

Use the **Send Options** dialog box to determine what data to include in the transfer set.

1. In the **Send Record Types** area, specify record types to include in the transfer set.

Note: Selecting a record type in the send options includes it in the transfer set; however, this does not guarantee the data will be retrieved at the retrieving site.

2. In the **Send users' calendar** area, select one or more users whose calendar activities should be included in the transfer set. To include the calendar activities of all users, select **(all)**.

Notes: For the user name(s) to be made available in the drop-down list of the remote's calendar, the user names(s) must be synchronized with the Users database. Add user names in the Users Master File.

History items are treated as user calendar items, and are only synchronized between users when user calendars are synchronized.

3. Select your **Encryption** level in the drop-down list. All transfer sets are encrypted at 128 or 32 bits.

4. Click **Next**. The **Send Contact-related Options** dialog box appears.

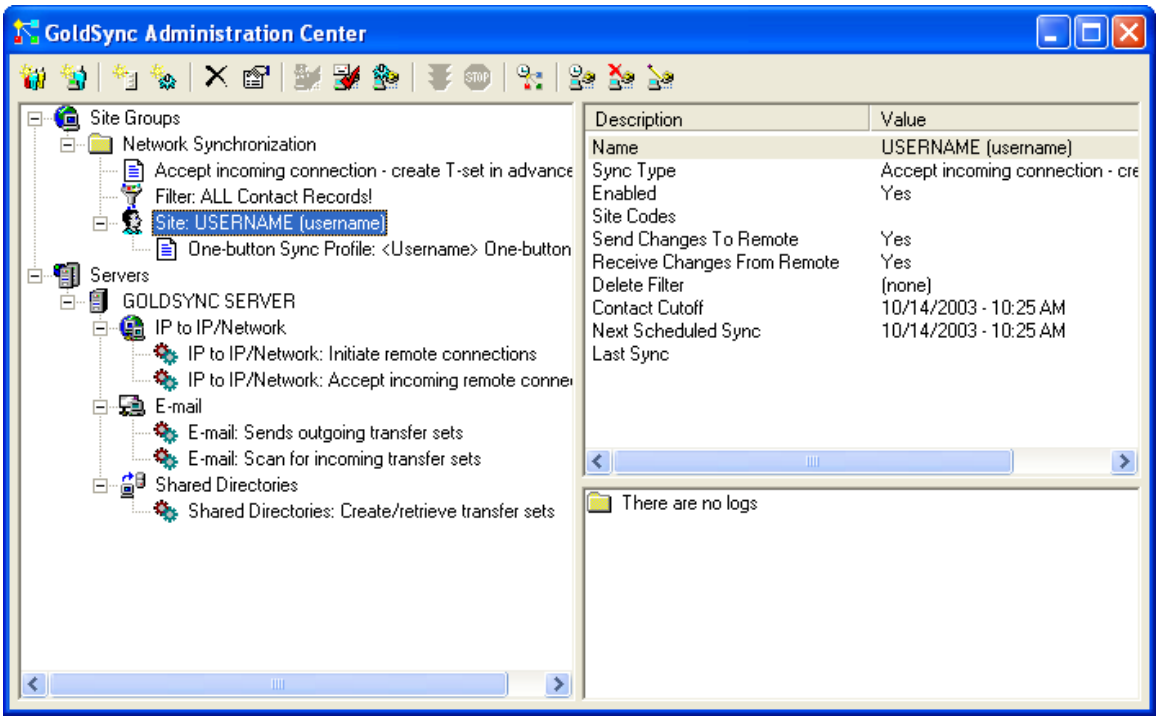
GoldSync

Using the GoldSync Administration Center

To start the GoldSync Administration Center, you must have GoldMine installed, running, and licensed with the correct licenses (E-license, S- and Y-licenses, D- and G-licenses). Systems with U-licenses do not have access to the GoldSync Administration Center.

The GoldSync Administration Center is the point of access for the site groups, sites, servers, and processes servers perform as defined for each site group.

(View...)



1. Select **Tools>>Synchronize>>GoldSync Administration Center**. The **GoldSync Administration Center** window appears.
2. Configure or edit these settings using the wizards:
   - **Site Group Wizard:** Creates a site group with the connection method and transfer set you select.
   - **Site Group Member Wizard:** Adds members to the newly created site group.
   - **Server Wizard:** Adds servers synchronizing with remote sites.
   - **Process Wizard:** Defines the processes performed for the site.

3. After configuring various aspects of the GoldSync Administration Center, use the toolbar, the Site local menu, and the Servers local menu to manage and edit the functions.
4. For synchronization to work automatically, you must start the processes. Expand **Servers**, the server name, and the server process. Highlight the process to start, right-click, and select **Start** to initiate the selected process or **AutoStart On** for GoldSync to run automatically during the times designated in the Server Agents Administrator.

Note: You must start the processes in the GoldSync Administration Center of the computer running the synchronization processes.

5. GoldSync can be also be run as a service.

Creating Sites

Sites are Site Group Members. They commonly have the same communication method and similar settings in the Site Group. Customize site send and retrieve options and filters.

There are two ways to create sites in the GoldSync Administration Center: after you create the Site Group or from the local menu.

1. In the **GoldSync Administration Center**, right-click a site group folder and select **New**. The **New Site Group Member** dialog box appears.
2. Select one of these options:
   - **Undocked User:** Select the undocked user from the drop-down list. The list includes undocked users created in the License Manager. If the undocked user does not exist, click Create Undocked User(s)/Sub-License.
   - **Sub-License:** Select the site from the drop-down list. The list includes sites created in the License Manager. If the site does not exist, click Create Undocked User(s)/Sub-License.
   - **Other License:** Type the license serial number in the text boxes.

3. Click **OK**. The **Welcome to the GoldSync Site Wizard** dialog box appears.
4. Type a name for the site.
5. Select **Allow this site to synchronize** to make the site active for synchronization after configuring it.
6. Click **Next**. The **Site Group** dialog box appears.
7. To make the site belong to a different group, select the **Site Group** from the drop-down list.
8. Click **Next**. The **Cutoff Date/Time** dialog box appears.
9. Select **Ignore cutoff time (send all records)** to send records. This option is available if you selected **ALL changed contact records** on the **Send Contact-related Options** dialog box.
10. Select **ALL contact records' cutoff** date and time to include new and changed data from the cutoff date you type or select from the F2 Lookup graphical calendar and clock. This option is available if you select **ALL changed contact records** or **All filtered records and user-scheduled activities' records** on the **Send Contact-related Options** dialog box.
11. Select **Contact records linked to Activities cutoff** date and time to include new and changed data linked to activities scheduled from the cutoff date and time. This option is available if you select **Contact records linked to the 'Send users' calendar list** or **All filtered records and user-scheduled activities' records** on the **Send Contact-related Options** dialog box.
12. Select the **Deletion-Filter** from the drop-down list. This option applies the deletion filter for a single synchronization and then clears the filter selection.

Note: When deleting a record on the remote site through a deletion filter, the deletion is not recorded as a change in the database. This prevents the deletion from synchronizing back to the host and lets the record synchronize back to the remote, if necessary.

13. Click **Next**. The **Override Options** dialog box appears, unless configuring a shared directory site (in this case, the **Next Synchronization Options** dialog box appears).

Creating Site Groups

Use the Site Group Wizard to set up site groups (the first step in configuring GoldSync). Configuration options you set for the group are inherited by each group member you add to the group. Using the Site Group Wizard, set the connection method, synchronization method and intervals, and the method by which transfer set data communicates between the remote site and the server and vice versa.

1. Select **Tools>>Synchronize>>GoldSync Administration**. The **GoldSync Administration Center** appears.
2. Right-click on **Site Groups** and select **New**. The **Welcome to the Site Group Wizard** dialog box appears.
3. Type a descriptive name for the site group and click **Next**. The **Synchronization Method** dialog box appears.
4. Select either:
    - In the **Connected Methods (IP to IP/Network)** area, select an option:

- **Accept an incoming connection:** The server accepts the initial request for data via modem, Internet direct, or network.
- **Initiate an outgoing connection at set intervals:** The server transfers data at a specified time. The interval is set by the user.

    - In the **Non-connected Methods (Internet: E-mail, Shared Directories)** area, select an option. Data transfer occurs without an active connection between the GoldSync Administration Center and the remote sites, using an Internet e-mail account or shared directory to transfer information:

- **Send and retrieve transfer sets via E-mail:** The transfer set creates in advance and transfers by e-mail.
- **Synchronize with another GoldSync server via shared directories:** Uses defined paths to directories for depositing and retrieving transfer sets.

5. Click **Next**. The **General Options** dialog box appears.

Creating Servers

A GoldSync Server is any computer handling the synchronization processes. It can be any computer on the network running a network copy of GoldMine.

For example, your main GoldMine Server may not have a modem. Rather than installing a modem, assign another computer on the network that does have a modem as the GoldSync Server. Each GoldSync Server assumes the computer name as the server name.

You can designate more than one computer on your network as a GoldSync Server. Have one server for IP/Network synchronization and one for e-mail synchronization.

Note: The GoldSync Server computers must have proper resources for the processes they are running.

Tip: Because GoldSync is resource-intensive, we recommend dedicating a server to executing GoldSync processes, especially when many users are synchronizing throughout the day.

Creating transfers for multiple users and managing multiple connections uses a significant amount of the system's memory, processor, and hard disk capacity.

1. In the **GoldSync Administration Center**, right-click on **Servers** and select **New**. The **Welcome to the Server Wizard** dialog box appears.
2. Type or browse to the name of the server to make a GoldSync Server.
3. Click **Next**. The available processes dialog box appears.
4. Select the processes to assign to the server.
    - **IP to IP/Network:** Accepts incoming remote connections
    - **IP to IP/Network:** Initiates remote connections.
    - **E-mail:** Scans for incoming transfer sets.
    - **E-mail:** Sends outgoing transfer sets.
    - **Shared Paths:** Creates/retrieves transfer sets created in advance.
5. Click **Next**. The **Finish** dialog box appears.
6. Click **Finish** and the **Welcome to the Process Wizard** dialog box appears; or right-click on the server name and select **New**. The **Welcome to the Process Wizard** dialog box appears.

Creating Server Processes

Use the Process Wizard to configure processes you are running on the GoldSync Server.

1. In the **GoldSync Administration Center**, right-click on the server name and select **New** from the local menu. The **New Process** dialog box appears.
2. Select the **Server** and the **Process Type** from the drop-down lists.
3. Click **OK**. The **Welcome to the Process Wizard** dialog box appears.
4. The **Welcome to the Process Wizard** dialog box displays the Server Name and the Process Type you are configuring. (If you are continuing from the Server Wizard, you start on this dialog box.)
5. The **Process Name** displays the process you are configuring. Click **Next**.
    - If configuring **IP to IP/Network** or **Shared Directories**, the **Number of Connections** dialog box appears.
    - If configuring **E-mail: Scan for incoming transfer sets**, the **Incoming E-mail Settings** dialog box appears.
    - If configuring **E-mail: Sends outgoing transfer sets**, the **Outgoing E-mail Settings** dialog box appears.

Configuring the Retrieve a Transfer Set Options

If you select **Retrieve a transfer set** on the connection method dialog box, then set the options on the **Retrieve a Transfer Set** dialog box.

1. In the **Path for the transfer set to be retrieved** text box, type or browse to the location to place the retrieved transfer set.
2. Select **Unpack transfer set only - do not retrieve records** to decompress the transfer set, and place the transfer set in the directory designated in Path for the transfer set. GoldMine also decrypts the transfer set (with a password value if entered in Optional transfer set password below). GoldMine will not retrieve the data into a Contact Set.

Note: Beginning with GoldMine 7.0, an unpacked transfer set is no longer a .dbf file, but an EBML file instead. This is a binary format similar to text-based XML, but with much better

performance. **FrontRange Support** has tools to decode the EBML files into a text form, should troubleshooting become necessary.

3. Select **Delete transfer set after unpacking or retrieval** to delete the transfer set after unpacking or retrieving the records into the designated Contact Set.
4. Type the **Optional transfer set password** in the text box to specify a password and protect the system from unauthorized connection attempts. When a password is used, both the local and remote systems must use the same password.
5. Click **Next**. The **Retrieve Options** dialog box appears.

Configuring the Retrieve Contact Set Options

Select which multiple contact sets to synchronize.

1. In the **Please specify which contact sets you wish to retrieve from the remote site** area, select the contact sets to retrieve.
2. In the **Default Contact Set** area, select the Contact Set in the drop-down list. This is the Contact Set to retrieve data into if there is no matching file code from the incoming transfer set.
3. Click **Next**. If you selected:
   - **Answer an incoming connection** on the connection method dialog box, the **Ready to Synchronize** dialog box appears.
   - **Connect to remote**, the **Connect/Send E-mail to Remote** dialog box appears.

Configuring the Transfer Set Creation Method

Use the **Transfer Set Creation Method** dialog box to determine if the transfer set is created while the remote site is connected or to have the transfer set created in advance for the remote site to pick up.

1. Select an option:
   - **Generate transfer set while site group member waits online:** When the remote sites initiate synchronization, they wait online while the transfer set is built and sent to them.
   - **Generate transfer set in advance for site group member(s) to pick up:** Your system generates the transfer set in advance and stores it in a shared directory. When the remote sites initiate synchronization, they stay online long enough for to send the transfer to them.

2. Click **Next**. The **Send Options** dialog box appears.

Configuring the Retrieve Contact Set Options

Select which multiple contact sets to synchronize.

1. In the **Please specify which contact sets you wish to retrieve from the remote site** area, select the contact sets to retrieve.
2. In the **Default Contact Set** area, select the Contact Set in the drop-down list. This is the Contact Set to retrieve data into if there is no matching file code from the incoming transfer set.
3. Click **Next**. If you selected:
   - **Answer an incoming connection** on the connection method dialog box, the **Ready to Synchronize** dialog box appears.

- **Connect to remote**, the **Connect/Send E-mail to Remote** dialog box appears.

Configuring the General Options (Site Groups)

In the **General Options** set the send and retrieve, password, and log information.

1. Select **Send changed data to site group's members** to let GoldSync accept a request from a remote site to create a transfer set.
2. Select **Retrieve changed data from site group's members** to let GoldSync retrieve a transfer set from the remote site.
3. Type an **Optional connection password** requiring remote users to enter a password when connecting to the server.
4. In the **Log Options** area, select from:

- **Log the details of each synchronization session:** Records Process Monitor information in the GoldMine system logs.
- **Log the transfer set details for the records sent/retrieved:** Records changes made to synchronized records.

Note: If information is stored for every synchronization session, the log information storage file could grow very large. Unless you are troubleshooting a sync issue, we recommend disabling log options.

5. Click **Next**.
   - If you selected **Accept an incoming remote connection** and **Send changed data**, the **Transfer Set Creation Method** dialog box appears.
   - If you selected another synchronization methods, and selected **Send changed data**, the **Send Options** dialog box appears.
   - If you selected only **Retrieve changed data**, the **Retrieve Options** dialog box appears.

Configuring the General Options (Sites)

Depending on the selections made on the Override Options dialog box, configure the General Options as needed.

1. Select **Send changed data to this site** to send changed data from this site to the remote site.
2. Select **Retrieve changed date from this site** to retrieve changed date from the remote site to this site.
3. Type the **Optional connection password**. The local and remote GoldMine sites must use the same password.
4. Select **Log the details of each synchronization session** to record the Process Monitor information in the GoldMine system logs.
5. Select **Log the transfer set details for the records retrieved** to record changes made to synchronized records.

Note: If information is stored for every synchronization session, the log information storage file could grow very large. Unless you are troubleshooting a sync issue, we recommend disabling log options.

6. Click **Next**. Depending on the selections made in the **Override Options** dialog box, one of these dialog boxes appears:
   - **Finish:** Click **Finish** to complete the process and return to the GoldSync Administration Center.
   - **Send Options**
   - **Send Contact-related Options**
   - **Send Filter Options**
   - **Retrieve Contact Set Options**
   - **Retrieve Options**

Configuring Send Contact-Related Options

After configuring the **Send Options**, use the **Send Contact-related Options** dialog box to evaluate records and send all new or changed contact records, send records based on whether they are linked to the names in the Send Users' calendars area of the Send Options dialog box, or all filtered records and records linked to selected users' activities.

1. In the upper drop-down list select one option:
   - **Only the current contact record:** (Available only in the Synchronization Wizard). Includes all the data, without regard to a cutoff date, for the active Contact Record only.
   - **All changed contact records:** Includes all new or changed records since the cutoff date in the transfer set.
   - **Contact records linked to the 'Send user's calendar' list:** Includes all new or changed records linked to the users selected in the users' calendar send options and then evaluates those records for changes since the cutoff date.
   - **All filtered records and user scheduled activity records:** Includes records that meet your filter criteria and those that do not fit the filter but have scheduled appointments linked to users selected in the **Send users' calendar** list.

2. In the **Please select contact sets you wish to send to the remote site** area, select the Contact Set or sets to include in the transfer set.

> **Note:** When synchronizing multiple databases, they should have file codes. The database codes should be same on the remote and on the main site.

3. Click **Next**. If you selected:
   - **Only the current contact record**, the **Retrieve Options** dialog box appears.
   - **All changed contact records**, **Contact records linked to the 'Send user's calendar' list**, or **All filtered records and user scheduled activity records**, the **Send Filter Options** dialog box appears.

One-button Synchronization

About One-Button Synchronization

When enabled on the remote GoldMine system, one-button synchronization gives the undocked, remote user a single-step synchronize process. Because the remote user cannot modify synchronization settings, the organization increases data security and enhances control of information access for each synchronizing remote system. One-button synchronization lets the GoldSync administrator:

- Create one-button synchronization profiles for each remote system running one-button synchronization.
- E-mail the one-button synchronization profiles to remote, undocked users.
- Create an undocked installer to install GoldMine on the remote system with the one-button synchronization profile (new GoldMine user).

Once created and sent, the remote user can:

- Retrieve the one-button synchronization profile.
- Retrieve the undocked installer file.
- Synchronize using one-button synchronization.

Creating One-Button Synchronization Profiles

Use the **One-button Sync Profile Wizard** option after creating site group members or from the GoldSync Administration Center Sites local menu. One-button synchronization profiles include the Instant Sync option to remind undocked users to synchronize when it detects a network connection.

1. In the GoldSync Administration Center, highlight the site, right-click and select **New One-button Sync Profile**. The **Welcome to the GoldSync Site One-button Sync Profile Wizard** dialog box appears.
2. Type the descriptive name of the profile in the text box. Click **Next**. The **Connection Method** dialog box appears.
3. Select a connection method:
   - **Connect to remote using IP to IP/Network method**.
   - **Send a transfer set to remote by E-mail**.

4. Click **Next**. The **Connect/Send E-mail to Remote** dialog box appears for **Connect to remote using IP to IP/Network** or **Send transfer set to remote by E-mail**.

Retrieving One-Button Synchronization Installation Files

As a remote user, when you receive the Undocked Installer package, install GoldMine by running the installer, named *username*.exe for the remote/undocked user.

The Undocked Installer package installs GoldMine using the undocked user license for your site, copies the data and files selected by the GoldSync administrator, and sets up the configured synchronization profile.

1. Locate the file sent to you on a zip disk or CD-ROM, using FTP, or e-mailed as an attachment. The file is named *username*.exe, where username is your GoldMine user name.
2. Open the file. It extracts the necessary files to the folder defined by the system's Windows Temp variable, usually C:\Windows\Temp.
3. After files are extracted, the Undocked Installer installs GoldMine and imports the data.

Retrieving One-Button Synchronization Profiles

When the GoldSync administrator creates or makes changes to your One-Button Synchronization Profile, he can e-mail you the profile. One-button synchronization profiles include the Instant Sync option to remind undocked users to synchronize when it detects a network connection.

1. In the GoldMine E-mail Center, double-click on the e-mail message with the subject line of **One-button Sync Profile**.
2. A GoldMine message box appears, indicating the message has a sync profile attached. Click **Yes**.
3. The profile installs. The **One-button Sync with GoldSync Server** menu option becomes active. Use **One-button Sync with the GoldSync Server**.

Synchronizing Using One-Button Synchronization

The GoldSync administrator configures one-button synchronization profiles and sends them to remote users. Once installed, the profile streamlines your remote, undocked user synchronization process.

1. Select **Tools>>Synchronize>>One-button sync with GoldSync Server**. The **One-button Synchronization** dialog box appears, indicating the GoldSync administrator has configured your system for One-button Synchronization.
2. Click **Sync**. The **Process Monitor** appears, indicating synchronization status.

Synchronization Wizard

Using the Synchronization Wizard

Define a variety of data and communication options to synchronize with a remote GoldMine or GoldSync system. Define the settings needed to create a transfer set or immediately start a synchronization session.

1. Select **Tools>>Synchronize>>Synchronization Wizard**. The **GoldMine Synchronization Wizard** dialog box appears.
2. Select one option:
   - **Start a new session:** Define settings for a synchronization session. Use these settings once or save for future use.
   - **Sync using the settings of a Sync Profile:** Synchronizes according to the settings already defined in a profile selected in the drop-down list.
   - **Sync using the settings of a GoldSync Site:** Synchronizes according to the previously defined settings for the site selected in the drop-down list. The site settings are defined in the GoldSync Administration Center. GoldMine uses only the send and retrieve options for the selected site configuration.
   - **Use the following profile/site settings:** Specifies the synchronization profile to use during the current session. This option is available only if you select Sync using the settings of a Sync Profile or Sync using the settings of a GoldSync Site.

Note: You can delete a synchronization profile selected in the drop-down list.

3. If you selected Sync using the settings of a Sync Profile or the settings of a GoldSync Site, click **Finish** to synchronize according to existing settings. The GoldMine Process Monitor appears.
4. To verify or change existing settings, click **Next** to continue to the connection method dialog box.

About the GoldMine Process Monitor

The GoldMine Process Monitor launches automatically when executing or running processes within GoldMine, including synchronization, Automated Processes, importing and exporting, or merging and purging.

Once opened, the Process Monitor can float anywhere on the GoldMine screen, or it can be "docked" to any of the four sides of the GoldMine screen. The window may also be resized to maximize available workspace. For best results, dock the Process Monitor to the bottom of the GoldMine screen.

The upper pane displays processes running and general status, while the lower pane displays the status of the component tasks.

Use the toolbar or the local menu to manage process options.

The Process Monitor uses color codes, assigned to text or the background, to indicate process status.

Color	Meaning
Black text on default background	Operation normal
Blue text on default background	Notice
Black text on yellow background	**Warning**
White text on red background	**Error**
Green text on default background	**Task successfully completed**

Configuring GoldSync in the Server Agents Administrator

Use the **Server Agents** Administrator to process GoldSync sites on the days and times specified.

1. Select **Tools>>Services>>Manage Server Agents**. The **Server Agents Administrator** dialog box appears.
2. Click the **GoldSync** tab.
3. If allowing only one user to publish his or her calendar using the Server Agent, select the user in the drop-down list in the **User's Settings** area.
4. To allow other users to use the Server Agent capability, select **Apply to other users** to enable the **Select Users** button. Click **Select Users** to select one or more users or user groups.
5. In the **Active Period** area, select the days of the week the agent will be active.
6. Type or select the active time period for each day using the right-facing arrows to access a list of times in thirty minute increments.

Note: Because the times are set on a daily basis, the earliest time is 12:00 A.M. and the latest is 11:59 P.M. The latest time cannot be 12:00 A.M. When setting the times, consider the full range of Server Agents you are running and what activities can take place after regular business hours. For example, GoldSync can draw upon many network resources and configure GoldSync to run after regular business hours to keep other processes running smoothly.

7. Click **OK**.

Note: You must start the Server Agents to begin processing.

WebImporting

About WebImporting

Set up Internet Web sites to collect contact information from interested visitors. Use the data in GoldMine by creating a Web form that includes instructions for handling the data.

Once information is submitted, a Web server script can format the data into an Internet e-mail message which can then be sent to a designated recipient. When **retrieving the e-mail message**, GoldMine recognizes the import instructions and creates a Contact Record with data captured from the Web page. Or, if a WebImport contact duplicates an existing contact, update selected fields.

Combining the WebImport feature with GoldMine's **Automated Processes** can automate capturing and responding to leads. Initiate Automated Processes automatically and send e-mail messages to GoldMine users alerting them of the incoming contact data.

(Using the WebImport Wizard)

An advanced knowledge of gateway scripts is not needed to implement the GoldMine WebImport feature. Begin by contacting your Web administrator and providing him or her with the sample HTML and Perl script. Writing and modifying scripts requires some programming expertise not covered in this material. Many sources for getting started with Common Gateway Interface (CGI) scripts are available on the Internet and in bookstores.

Note: FrontRange Solutions' technical support cannot provide support for creating or maintaining HTML code or CGI scripts.

Using the WebImport Wizard

The WebImport Wizard creates the HTML form and script to process the contact information input by visitors on a Web site. You do not need to type the code and can create the forms in PERL, ASP, and PHP. Because all activities are driven off the Web server, Internet access is necessary.

The Web form captures the data, and the script formats it into an Internet e-mail message which can then be sent to a designated recipient. When retrieving the e-mail message, GoldMine recognizes the import instructions and creates a Contact Record with all the data captured from the Web page or updates selected fields if a WebImport contact is a duplicate of an existing contact.

Attach an Automated Process to a new or duplicate contact. Automated Processes can be initiated automatically, and e-mail messages sent to GoldMine users alerting them of the incoming contact data.

Once the form and script are e-mailed to the designated recipient, the Web administrator can place the HTML form page and the script source code on the WebImport server(s).

To use the WebImport Wizard, select **Go To>>Campaigns**, click the **Campaigns** button in the Navigation Pane, then click **Configure WebImport** on the toolbar, Alternately, select **Web>>Setup Web Import** and click **New**.

Set an authorization password, then create, edit, rename, and delete WebImport Profiles in the **WebImport Profiles** dialog box.

Using WebImport Profiles

After creating a WebImport form and script using the WebImport Wizard, edit, rename, and delete WebImport profiles with these options on the **WebImport Profiles** dialog box:

- **New:** Create a new import form and script.
- **Edit:** Edit an existing import form and script.
- **Rename:** Type a new name for the campaign.
- **Delete:** Removes the selected WebImport profile.
- **More>>:** Users with Master rights have these settings available:
- **Optional Web Import authorization password:** Protect the WebImport process with passwords so only authorized incoming instruction files may be imported. This prevents unauthorized persons from sending e-mail messages and inundating a GoldMine system with unwanted data.
- **Fields to be Updated by WebImport:** Type **I Want To Allow Fields To Be Updated By WebImport** in the text box to let visitors to your Web site update their information in your GoldMine database.
- **Fields that can be updated:** Select the fields to be updated by the WebImport.

Creating Web Forms

The Web form is an HTML document for collecting information. Users type text and make choices from check boxes, radio buttons, and selection lists. Design forms meeting customer requirements by combining these input types; use or modify the sample HTML form below. The name of fields in your form must be identical to the names in your GoldMine databases.

How Forms Work

A Web form works with a script on a server to process submitted information. When a person fills out a form and clicks Submit, the browser sends (or posts) information in the form to the script or application running on the server for processing. The script processes the information passed from the browser to the server. The processed information can be sent back to the server, or, as with GoldMine's WebImport feature, sent by e-mail to a designated recipient.

Example of an HTML file using a form:

```
<!----The following is an example of an HTML file using a form---->

<HTML>

<HEAD><TITLE>FrontRange Solutions Inc. - Online

Registration</TITLE></HEAD>
```

```
<BODY BGCOLOR="#008080" Text="#FFFFFF" LINK="#000000" VLINK="#FF8900">

<BASEFONT SIZE=3>

<!----This is where the table layout begins---->

<TABLE BORDER=3>

<TR>

<TD><FONT SIZE=+3>FrontRange Solutions Inc.</FONT></TD>

</TR>

<TR><TD><FONT SIZE=+2>Online Registration Form</FONT></TD>

</TR>

</TABLE>

<!----This is where the table layout ends---->

<P>

<B>

<CENTER>To register your copy of GoldMine, please fill out the
following form.</CENTER>

<CENTER>Your registration number is located on the registration
card.</CENTER>

<HR>

<!-----This is where the form layout begins---->

<!----The line below references the PERL script---->

<FORM METHOD=POST ACTION="http://www.frontrange.com/cgi/webimp.pl">

<!----The line below references an HTML page, created separately, that
will appear once the message has been sent---->

<INPUT TYPE="hidden" Name="thankURL" value="thankyou.htm">

<!----Replace "yourname@yourname.com" in the line below with the E-Mail
address where you want to receive the results of this form---->

<INPUT TYPE="hidden" NAME="email_to"value= "yourname@yourdomain.com">

<DT>GoldMine Serial Number
```

```
<DD>

<INPUT NAME="cs1_Rectype" TYPE="hidden"  VALUE="P">

<INPUT NAME="cs1_Contact" TYPE="hidden" VALUE=            "Serial
Number">

<INPUT NAME="cs1_ContSupRef" TYPE="text" SIZE="15" MAXLENGTH="15">

<BR>

<DT>Number of Licenses

<SELECT NAME="Key1">

<OPTION VALUE="Gold 01/Single user">Single user

<OPTION VALUE="Gold 05 Net">5 user Network

<OPTION VALUE="Gold 10 Net">10 user Network

<OPTION VALUE="Gold 10-25 Net">10 - 25 user Network

<OPTION VALUE="Gold 25-50 Net">25 - 50 user Network

<OPTION VALUE="Gold 51+ Net">51+ user Network

<OPTION VALUE="Gold Net Unknown">Not Sure

<OPTION SELECTED>Choose One

</SELECT>

<P>

<DT>Date of Purchase

<INPUT NAME="cs1_Country" TYPE="text" SIZE="35" MAXLENGTH="35"
VALUE="MM/DD/YY">

<P>

<DT>Place of Purchase

<INPUT NAME="cs2_Rectype" TYPE="hidden" VALUE="P">

<INPUT NAME="cs2_Contact" TYPE="hidden" VALUE="Place of Purchase">

<INPUT NAME="cs2_ContSupRef" TYPE="text" SIZE="35" MAXLENGTH="35"
VALUE="">
```

```
<HR>

Ms. <INPUT TYPE="radio" NAME="Dear" VALUE="Ms.">

Mr. <INPUT TYPE="radio" NAME="Dear" VALUE="Mr.">

<DT>Name

<DD><INPUT SIZE="40" MAXLENGTH="40" NAME="CONTACT">

<DT>Title

<DD><INPUT SIZE="30" MAXLENGTH="30" NAME="TITLE">

<DT>Company Name

<DD><INPUT SIZE="40" MAXLENGTH="40" NAME="COMPANY">

<DT>E-Mail Address

<DD>

<INPUT NAME="cs3_Rectype" TYPE="hidden" VALUE="P">

<INPUT NAME="cs3_Contact" TYPE="hidden" VALUE="Internet Address">

<INPUT NAME="cs3_ContSupRef" TYPE="text" SIZE="30" MAXLENGTH="30">

<DT>Address1

<DD><INPUT SIZE="40" MAXLENGTH="40" NAME="Address1">

<DT>Address2

<DD><INPUT SIZE="40" MAXLENGTH="40" NAME="Address2">

<DT>City

<DD><INPUT SIZE="26" MAXLENGTH="26" NAME="City">

<DT>State/Province

<DD><INPUT SIZE="3" MAXLENGTH="3" NAME="State">

<DT>Country

<DD><INPUT SIZE="20" MAXLENGTH="20" NAME="Country">

<DT>Zip/Postal Code

<DD><INPUT SIZE="10" MAXLENGTH="10" NAME="Zip">
```

```
<DT>Telephone Number (WITH AREA CODE)

<DD><INPUT SIZE="30" MAXLENGTH="30" NAME="Phone1" VALUE="(xxx)xxx-
xxxx">

<DT>Fax Number (WITH AREA CODE)

<DD><INPUT SIZE="30" MAXLENGTH="30" NAME="Fax" VALUE="(xxx)xxx-xxxx">

<HR>

<DT>Contact Manager/PIM, if any, prior to purchasing GoldMine

<SELECT NAME="userdef05">

<OPTION VALUE="ACT!">Act!

<OPTION VALUE="TeleMagic">TeleMagic

<OPTION VALUE="Janna Contact">Janna Contact

<OPTION VALUE="Ecco">Ecco

<OPTION VALUE="Lotus Organizer">Lotus Organizer

<OPTION VALUE="Other">Other

<OPTION SELECTED>Choose One

</SELECT>

<P>

Computer Type:<BR>

<INPUT TYPE="radio" NAME="cs5_ContSupRef" VALUE="Desk top">Desktop

<INPUT TYPE="radio" NAME="cs5_ContSupRef" VALUE="Laptop/NOTEbook">
Laptop/NOTEbook

<INPUT TYPE="radio" NAME="cs5_ContSupRef" VALUE="Desktop &
Laptop/NOTEbook"> Both

<INPUT NAME="cs5_Rectype" TYPE="hidden" VALUE="P">

<INPUT NAME="cs5_Contact" TYPE="hidden" VALUE="Computer Type">

<P>

<DT>Network Operating System
```

```
<SELECT NAME="userdef07">

<OPTION VALUE="LAN Man">LAN Manager

<OPTION VALUE="Novell">Novell

<OPTION VALUE="OS/2">OS/2

<OPTION VALUE="Pathworks">Pathworks

<OPTION VALUE="Win4WrkGrp">Windows 3.11 for Workgroups

<OPTION VALUE="Windows 98">Window 98

<OPTION VALUE="Windows NT">Windows NT

<OPTION VALUE="Windows NT 4.0">Windows NT 4.0

<OPTION VALUE="Other">Other

<OPTION SELECTED>Choose One

</SELECT>

<P>

Primary Business at your company:

<SELECT NAME="Key3">

<OPTION VALUE="Advertising">Advertising

<OPTION VALUE="Real Estate">Real Estate

<OPTION VALUE="Banking/Finance">Banking/Finance

<OPTION VALUE="Medical">Medical

<OPTION VALUE="Telecommunications">Telecommunications

<OPTION VALUE="Government">Government

<OPTION VALUE="Aerospace">Aerospace

<OPTION VALUE="Insurance">Insurance

<OPTION VALUE="Computer">Computer

<OPTION VALUE="Manufacturing">Manufacturing

<OPTION VALUE="Legal">Legal
```

```
<OPTION VALUE="Entertainment">Entertainment

<OPTION VALUE="Electronics">Electronics

<OPTION VALUE="Other">Other

<OPTION SELECTED>Choose One

</SELECT>

<P>

<DT>Where did you learn about GoldMine?

<SELECT NAME="Source">

<OPTION VALUE="Advertising">Advertising

<OPTION VALUE="Acquaintance">Acquaintance

<OPTION VALUE="Demo Disk">Demo Disk

<OPTION VALUE="Trade Show">Trade Show

<OPTION VALUE="Magazine Review">Magazine Review

<OPTION VALUE="Reseller">Reseller

<OPTION VALUE="Literature">Literature

<OPTION VALUE="Other">Other

<OPTION SELECTED>Choose One

</SELECT>

<P>

<DT>Comments

<TEXTAREA NAME="NOTEs" ROWS=4 COLS=72></TEXTAREA>

<P>

</DL>

<INPUT TYPE="submit" VALUE="Register">

<INPUT TYPE="reset" VALUE="Reset Form">

</FORM>
```

```
<!----This is where the form layout ends---->

<B>

</BODY>

</HTML>
```

Creating Server Scripts

The Common Gateway Interface (CGI) is the specified standard for communication between HTTP servers (Web servers) and server-side gateway programs. The CGI specifications define how data passes from the server to gateway programs, and vice versa.

Gateway programs can be compiled programs written in languages such as C, C++ or Pascal, or they can be executable scripts written in languages such as Perl, TCL, ASP, and other various shell programs. Most gateway programs are Perl scripts; they are easy to write and modify and are transportable between computers.

Sample PERL Gateway Script for GoldMine WebImport

```
#!/usr/local/bin/perl
# check for the POST method
if ($ENV{'REQUEST_METHOD'} eq 'POST')
{
# How many bytes are we supposed to receive?
read(STDIN, $buffer, $ENV{'CONTENT_LENGTH'});
# make a list of keyword/value pairs
@pairs = split(/&/, $buffer);
# cycle through each pair and decipher the values foreach $pair
(@pairs)
{
# get the name/value pair strings
($name, $value) = split(/=/, $pair);
# translate "+" to a space
$value =~ tr/+/ /;
# decipher ASCI hexidecimal escaped characters, if any
$value =~ s/%([a-fA-F0-9][a-fA-F0-9])/pack("C", hex($1))/eg;
# find profile/contsupp field names that begin with cs*_
if ($name =~ /cs\d_/)
#add the profile/contsupp pair to a list keyed on the name of the
variable
{$csarry{$name} = $value;}
else {
```

```
#add the basic field data pair to a list keyed on the name of the
variable
$contents{$name} = $value
}
}
}
($mon,$day,$year) = split(m>>/>>,'/bin/date +%B/%e/%Y');
$date = "$mon $day, $year";
$to = $contents{'email_to'};
&mailto;
&thankyou;
###############
## subroutines from here on down!
###############
sub thankyou {
print "Location: http://www.frontrange.com/thankyou.htm\n\n";
exit;
}
sub mailto {
open (MAIL, ">>/usr/lib/sendmail -t") >>>>die "can't open pipe to
sendmail \n";
print MAIL "Content-Type: application/x-gm-impdata\n";
print MAIL "To: $to\n";
print MAIL "From: $csarry{'cs2_ContSupRef'}\n";
print MAIL "Subject: datafromgoldform.pl\n";
print MAIL "\n\n";
print MAIL "\[Instructions\]\n";
print MAIL "SaveThis=Web Import File\n";
print MAIL "DupCheck1=Contact\n";
print MAIL "\n";
print MAIL "OnNewSendEmail=Bart,NEW,Prospect requesting information
\n";
print MAIL "OnDupSendEmail=Natalie,,Duplicate Record \n";
print MAIL "\n";
print MAIL "OnNewAttachTrack=WEB Lead\n";
print MAIL "\n";
# The following is an example of testing a field for a value
#print MAIL "Below a message will be printed if the CITY is
Torrance\n\n";
if ($contents{CITY} eq "Torrance") {
```

```
print MAIL "OnAnySendEmail=John,WCC,This one is from Torrance\n";
}
print MAIL "\n";
#print MAIL "Run=c:\goldmine\webimp.exe\n";
print MAIL "\n";
print MAIL "\n";
print MAIL "\[Data\]\n";
# print out general fields and values
foreach $name (sort keys %contents) {
next if $contents{$name} eq "";
print MAIL "$name = $contents{$name}\n";
}
print MAIL "\n";
print MAIL "\[ContSupp\]\n";
# print out profile/contsupp fields and values
foreach $name (sort keys %csarry) {
next if $csarry{$name} eq "";
print MAIL "$name = $csarry{$name}\n";
}
print MAIL "\n";
print MAIL "\n";
print MAIL "\n";
print MAIL "\n\n";
close (MAIL);
}
```

Formatting WebImport Files

The incoming import file contains contact data and instructions. It must conform to a specific format, similar to .ini files. Three major import file sections:

- **[Instructions]:** Define import instructions. These instructions allow duplicate checking, sending e-mail messages to GoldMine users, attaching Automated Processes, and running external applications to further process the incoming contact data. GoldMine can check if the contact already exists by considering the DupCheck#= instructions. The first duplicate checking instruction usually must be based on one of the indexed fields, Contact, Company, Phone1, City, State, Country, Zip, AccountNo, Key1, Key2, Key3, Key4, or Key5. Additional DupCheck#= instructions can be specified to test more than one field to determine if the incoming contact data is a duplicate.

Example:

DupCheck1=Contact

```
DupCheck2=Company
```

- **[Data]:** Defines contact data. Format each entry as fieldname=value; for example, City=Long Beach. The filename should be the actual field name in the Contact1 or Contact2 files. A special email=field can be used to insert the contact's e-mail address.
- **[ContSupp]:** Allows addition of detail records. The fields of each record must have a prefix of cs#_, and must appear consecutively. For example, the fields of the first ContSupp record would have the prefix cs1_, while the fields of a second record would have a prefix of cs2_. Add a maximum of 8 ContSupp records.

Checking for Duplicate ContSupp Data

GoldMine can check for duplicate records based on ContSupp data by specifying the ContSupp record prefix; for example, CS1. When GoldMine identifies a duplicate record, but notices the contact name does not match the existing name, an additional contact is created with the incoming data under the existing Contact record. GoldMine also adds ContSupp records that do not already exist.

Checking for Duplicate E-Mail Addresses

Configure GoldMine to check for duplicate records based on an e-mail address. Run this check without including a check based on indexed fields. To check for duplicate e-mail addresses, include the statement:

```
DupCheck=Email
```

Using Commands to Automatically Perform Operations

E-Mail

Send e-mail messages to GoldMine users alerting them of newly created contact records. Send a separate e-mail message based on whether the contact is new [OnNewSendGMEmail=], or already exists on file [OnDupSendGMEmail=]. Designate a user as the message recipient, followed by an optional activity code, then an optional reference. Send multiple e-mail messages by appending consecutive numbers to the send e-mail instructions; for example, OnNewSendGMEmail1=, OnNewSendGMEmail2=, and so on.

Automated Processes

Attach Automated Processes to the contact to initiate an automated response. Initiate letters, faxes, e-mail, and other activities to automate responding to the captured leads. Attach a separate Automated Process based on whether the contact is new [OnNewAttachTrack=], or already exists on file [OnDupAttachTrack=]. You must specify the track name, followed by an optional attaching user. For faster processing, also specify the internal track number instead of the track name. Attach multiple Automated Processes by appending consecutive numbers to the attach track instruction; for example, OnNewAttachTrack1=, OnNewAttachTrack2=, and so on.

Launch an External Application

To launch an external application for further processing of the incoming data, use the Run=<exefile> instruction. This command allows flexibility, since custom programs can be written

to perform a variety of tasks. GoldMine saves import instructions to a file, and passes that file name as a parameter to the launched application.

Extracting Import Instructions and Data

Since the import instructions are similar to .ini files, use Windows API GetPrivateProfileString to extract the import instructions and data. The ImportData=0 instruction prevents GoldMine from importing any new data, and lets the custom application append the data.

The SaveThis=<reference> instruction saves the instruction file to the notes of a new history record. Specify any history reference; for example, SaveThis=Web import file.

Protect the WebImport process with passwords to allow importation of only authorized incoming instruction files.

GoldMine can also process an import instruction file by sending a DDE command. Using a DDE command lets other applications create Contact records in GoldMine. To start processing an instruction file through DDE, send the ExecIniImp (<filename>) command; for example, ExecIniImp(i.C:\GoldMine\ imp.ini)].

Example 1:

Since GoldMine stores Web site addresses as detail records (called Web Site), import these addresses using the following syntax:

```
[ContSupp]

cs1_RecType=P

cs1_Contact=Web Site

cs1_ConSupRef=http://www.web.site.com

cs_Address1=notes (optional)
```

Example 2 (correct format for an import instruction file):

```
[Instructions]

DupCheck1=Contact

OnNewSendGMEmail=JOHN, NEW, Prospect requesting information

[Data]

Company=Global Corp.

Contact=John Doe

Phone1=555/333-1234
```

```
email=jdoe@global.com

[ContSupp]

cs1_RecType=P

cs1_Contact=Serial Number

cs1_ContSupRef=10000002

cs1_Address1=This is a test....
```

The following example shows a short instruction file containing the password “Doodle”:

```
[Instructions]

Password=Doodle

DupCheck1=Contact

OnNewSendGMEmail=JOHN, NEW, Prospect requesting information

[Data]

Company=Global Corp.

Contact=John Doe

Phone1=555/333-1234

email=jdoe@global.com
```

Example 3 (an import instruction file containing all possible instructions:)

```
[Instructions]

DupCheck1=Contact

DupCheck2=userDef05

DupCheck3=cs1

OnNewSendGMEmail=JOHN, NEW, Prospect requesting information

OnDupSendGMEmail=AMI,,Repeated request...

OnNewAttachTrack=Web Lead

OnDupAttachTrack=100067,JOHN
```

```
Run=c:\goldmine\webimp.exe

SaveThis=Web import file

;ImportData=0

Password=Verify

[Data]

Company=Global Corp.

Contact=John Doe

Phone1=555/333-1234

Address1=1401 West Baker Street

City=Garden Grove

State=CA

Zip=90220

Source=Web Page

email=jdoe@global.com

[ContSupp]

cs1_RecType=P

cs1_Contact=Serial Number

cs1_ContSupRef=10001001

cs1_Address1=This is a test...

cs2_RecType=C

cs2_Contact=Jane Adams

cs2_Title=Beta Program Manager
```

Also require a password on your WebImport Files.

Importing Contacts with WebImporting

GoldMine's Internet e-mail reader identifies data retrieved from the WebImport Gateway. GoldMine looks at the header of every e-mail message for handling instructions.

Example of special header information:

```
Content-Type: application/x-gm-impdata
```

When an e-mail message containing WebImport information is retrieved, GoldMine handles the message. Alternatively, an incoming message can trigger the WebImport with this To: line entry:

```
{$GM-WebImport$}
```

Format the WebImport files

Requiring Passwords on WebImport Files

Web Import processes are protected with passwords to allow importation of only authorized incoming instruction files. This prevents unauthorized persons from sending e-mail messages and inundating a GoldMine system with unwanted data. A password is always required to use Web Import. The incoming instruction file will not be processed if it does not contain a password or if it contains an invalid password.

The Web Import authorization password is set at the top of the Web Import Profiles dialog. A password must be set before the Web Import functions are made available.

Updating GoldMine Fields with WebImport Data

If a contact already in your database fills out a Web form, set the WebImport to update specified Contact1 and Contact2 fields instead of creating duplicate records. Also enable WebImport to update e-mail addresses and append Notes.

With these settings, GoldMine updates only the specified fields and discards changes to fields not included in the list.

The e-mail address is added only if it differs from the existing addresses. It is added as the new primary address and the others save as alternative addresses.

Warnings: Accepting changes from a WebImport may cause data integrity problems.

We recommend observing these additional security precautions when enabling WebImport overrides:

- Do not accept WebImport e-mails from an unknown e-mail address.
- Limit access to the WebImport e-mail account to one user, the GoldMine administrator with Master Rights.
- Protect your WebImport files with a password and monitor the WebImport passwords regularly for changes.

Back up GoldMine data daily if running daily WebImports.

Enabling Field Updates with WebImporting

1. Using a text editor, such as Windows Notepad, open the GM.ini.
2. Add this section and lines:

```
[WebImportOverwrite]
IAgree=I Want To Allow Fields To Be Updated By WebImport
Fields=<list the contact1 and contact2 fields that can be
updated, separated by a comma>
```

Example: `Fields=Key1,Fax,UData`

3. Select **File>>Save** and close the text editor.

Note: The Accountno or Recid fields can never be overwritten using the GoldMine WebImport.

Setting Up SoftPhone

SoftPhone Set Up Requirements

The following table lists the hardware and softphone components required to run SoftPhone within GoldMine. For instructions on setting up SoftPhone with GoldMine, see Configuring SoftPhone.

To control calls, Softphone uses Session Initiation Protocol (SIP). To send and receive voice-over IP, Softphone uses Real-time transport protocol (RTP).

Components	Description
Hardware	The PC running SoftPhone must have at least one audio device installed (such as an audio card or a USB headset). Softphone will not start without an instance of an audio device or audio card.
Workstation/Server Operating System	• Windows XP, SP2 or higher if using Windows 2003 server. 128MB system memory is recommended. Intel® Pentium® 166 MHz or higher CPU (Pentium II or higher recommended). 64 MB RAM. (128 is recommended)
SIP Gateway	An SIP Gateway server, such as VEGASTREAM VoIP Gateway
SIP Server	An SIP Server, such as IPCC SIP Server

VoIP Services	Such as, Broadvoice and Vonage
RTP Data Ports	42100 and higher.

Configuring SoftPhone

Set up SoftPhone within GoldMine.

1. Select **Tools>>Options**. The User's preferences window appears.
2. Click the **Telephony** tab.
3. In the Dial Number Formatting area, click the **Let TAPI format phone numbers** checkbox.

This will reduce data entry mistakes as all entries will be formatted in TAPI (Telephony Application Program Interface) format.

4. In the **SoftPhone (SIP Client**) area, do the following:

- In the **Local Ext** field, enter the user's phone extension number.
- Click the **Use SoftPhone by default** checkbox. This ensures SoftPhone is your default telephony device.
- Click the **Advanced** button.

The **SoftPhone/SIP Settings** window appears.

5. In the **SoftPhone/SIP Settings** window, enter the required information into the following fields:

- **SIP Server Address:** Enter the IP address of your primary SIP server. Obtain this information from your SIP administrator or your service provider.
- **SIP Server Port:** Enter the port number of your primary SIP registrar**.** The default port number is **5060**. SoftPhone attempts to bind with this port first. If it is not available, the next port it attempted, and so on. Obtain this information from your SIP administrator or your service provider.
- **Register with Registrar:** Select this checkbox if you want the proxy server to register with the SIP registrar. To find out whether you need to set this option or not, see your SIP administrator or your service provider.
- **Registrar Address:** Enter the IP address of your primary SIP registrar. Obtain this information from your SIP administrator or your service provider.
- **Registrar Port:** Enter the port number of your primary SIP registrar. Obtain this information from your SIP administrator or your service provider.
- **Username:** Enter the user name as defined by the service provider for your dial plan.

This option may not be necessary if your system does not require a login.

- **Password:** Enter password as defined by the by the service provider for your dial plan.

This option may not be necessary if your system does not require a login.

- **Local SIP Port:** The SIP port number specific to the SoftPhone as specified in the dial plan. This information can be obtained either from your SIP administrator or your service provider.
- To access an outside line, dial: Enter, if required, a prefix, such as "1" to access outside lines.

8. Enter the following optional information:
   - **Automatically "Complete a Call" when an outgoing call ends**: Presents the Complete an Outgoing Call dialog box in GoldMine which allows the user to enter and review information about the call such as notes Opportunity information and schedule follow-up calls.
   - **Automatically "Complete a Call" when an incoming call ends:** Presents a dialog box in GoldMine which allows the user to enter information about the call. .

Plug-Ins

About GoldMine Plug-ins

GoldMine contains a mechanism to support ActiveX controls and HTML-based integrations as if they were part of GoldMine. The structures allow for rapid integration, ease-of-use, and security.

To begin, create an Active X control or an HTML file/web site for integration, then set up security.

ActiveX Controls

ActiveX structure provides the most control and can be created with these programming languages: C++, Delphi, Visual Basic, and .NET. When used with other GoldMine APIs, ActiveX is powerful.

Within the ActiveX support, 4 methods can be implemented in your control for stronger interaction with GoldMine. These functions are not necessary to implement:

```
public void GMOnStart(long hWnd)T
```

This is the only function that passes a parameter. The parameter is the HWND (window handle) of the container window in GoldMine. Use the Windows API SendMessage() call to control what happens to the container (for implementing a Close button—since the control is late bound in GoldMine, and cannot expose events).

```
public void GMOnActivate()
```

This function tells you when the user has given your control's container focus in GoldMine.

```
public void GMLostFocus()
```

This function is called whenever the user gives focus to another object when your control had focus.

```
public void GMOnDestruct()
```

This function is called when the window is just about to close; it provides the opportunity to clean up.

See Plug-in Description File

HTML Integrations

The HTML attempts to call a JavaScript or VBScript function named like the last 3 ActiveX methods, meaning exactly the same thing. The GMOnStart() function is not supported in HTML:

```
function GMOnActivate();
function GMLostFocus();
function GMOnDestruct();
```

See Plug-in Description File

Plug-in Description File

The plug-in description file is a well-formed XML file describing the plug-in. The extension for the file is **.GME** (GoldMine Extension).

HTML

Structure for the HTML plug-in

```
<PlugInDefs>
<PlugInDef>
<URL>http://gmail.google.com/gmail</URL>
<QueryString>q=&lt;&lt;&amp;Address1&gt;&gt;,
&lt;&lt;&amp;City&gt;&gt;, &lt;&lt;&amp;State&gt;&gt;,
&lt;&lt;&amp;Zip&gt;&gt;</QueryString>
<Description>
<Language Locale="1033" IsDefault="1">
<Name>G-Mail</Name>
<Publisher>Google</Publisher>
<Description>Launches Google's Gmail Service</Description>
<Menu>Launch GMAIL</Menu>
</Language>
<Language Locale="4000">
<Name>eegay ale-may</Name>
<Publisher>oogle-Gay</Publisher>
<Description>aunches-Lay oogle-Gay's eegay ale-may Urvice-
Say</Description>
<Menu>aunch-Lay eegay ale-may</Menu>
```

```
</Language>
</Description>
<OnDemand>1</OnDemand>
<Startup>1</Startup>
<MultipleInstance>0</MultipleInstance>
<Modal>0</Modal>
<DefaultPos>
<top>50</top>
<left>50</left>
</DefaultPos>
<DefaultSize>
<width>800</width>
<height>600</height>
</DefaultSize>
<Visible>1</Visible>
</PlugInDef>
</PlugInDefs>
```

HTML plug-in details

The root node must be PlugInDefs and as the name implies, multiple plug-ins can be installed under one definition file. For each plug-in, there is a PlugInDef. The child nodes for PlugInDef are:

- **URL:** The URL for the HTML file or Web site must be http://, https:// or file://.
- **QueryString:** The querystring to be tacked on to the end of the URL. Can contain GoldMine field macros that will be evaluated on launch of the plug-in. The macro wrapping structure is <<field>>, like <<&Contact>> or <<Contact1->AccountNo>>.

Note: You must XMLEncode the macros as shown in the structure above.

- **Description:** The values here describe the item to the user and can contain multiple languages to describe the file, using the locale code associated with the target language. One language structure must be marked as IsDefault and is used in case the target language is not supported by the plug-in. Use XML entities in place of extended characters. For example, **Ñ** would be **Ñ**.

- **Name:** Dialog name used for security.
- **Publisher:** Your company name. Creates a sub menu under the Plug-ins menu.
- **Description:** Used in the **Help>>About Plug-ins** button.
- **Menu:** The text the user sees for a menu item.

- **OnDemand:** Determines if the plug-in is added to the plug-ins menu. 1 = True, 0 = False. If false, the item is started up with GoldMine.

- **StartUp:** Determines if the item is started up with GoldMine. This is for situations where you want it to start, but if the user closes the window you want them to be able to access the plug-in via a menu. 1 = startup with GoldMine, 0= don't start with GoldMine.
- **MultipleInstance:** Determines if multiple instances of the plug-in are allowed. 1 = allow multiple instances, 0 = false. When false, if the user chooses the menu item for that plug-in, GoldMine will bring that window to the front and give it focus. non-OnDemand, Modal, and non-visible plug-ins are automatically single instance.
- **Modal:** Determines if any action can occur outside of the window in GoldMine. 1= Modal, 0 = Modeless. Startup/non-OnDemand items cannot be modal. Modal items are strictly single instance.
- **DefaultPos:** The coordinates where your dialog first appears. This is only used the first time the plug-in is run and is ignored for Modal plug-ins, which automatically center in relation to the GoldMine window.
- **DefaultSize:** Describes the height and width of the dialog box for first time use or for modal windows, which cannot be resized.
- **Visible:** Determines if the user can see the window. Not recommended for HTML-based plug-ins.

ActiveX

Structure for the ActiveX plug-in

```
<PlugInDefs>
<PlugInDef>
<ProgID>myApp.ClassInstance</ProgID>
<Installer>myAppInstaller.exe</Installer>
<Description>
<Language Locale="1033" IsDefault="1">
<Name>G-Mail</Name>
<Publisher>Google</Publisher>
<Description>Launches Google's Gmail Service</Description>
<Menu>Launch GMAIL</Menu>
</Language>
<Language Locale="4000">
<Name>eegay ale-may</Name>
<Publisher>oogle-Gay</Publisher>
<Description>aunches-Lay oogle-Gay's eegay ale-may Urvice-
Say</Description>
<Menu>aunch-Lay eegay ale-may</Menu>
</Language>
</Description>
<OnDemand>1</OnDemand>
<Startup>1</Startup>
<MultipleInstance>0</MultipleInstance>
```

```
<Modal>0</Modal>
<DefaultPos>
<top>50</top>
<left>50</left>
</DefaultPos>
<DefaultSize>
<width>800</width>
<height>600</height>
</DefaultSize>
<Visible>1</Visible>
</PlugInDef>
</PlugInDefs>
```

ActiveX plug-in details

Although it is very similar to the HTML plug-in description, there are 2 primary differences, the ProgID and Installer nodes instead of the URL and QueryString nodes.

The ProgID is the ProgID for your ActiveX control and the Installer is the installer name for the application. The Installer should be sitting in a folder named Installers under the plug-in directory.

Plug-in Security

Using GM.ini or the User.ini, a user or administrator can block the use of plug-ins altogether, block individual plug-ins, and add user-specific directory for more plug-ins.

GM.INI has precedence over the user INI file. Two methods are available:

- **Optimistic:**

```
[PlugIns]
allow_by_default=1
```

- **Pessimistic:**

```
[PlugIns]
deny_by_default=1
```

allow_by_default=0 is the same as **deny_by_default=1** and vice versa. If the keys are missing, the method is assumed to be **Optimistic**.

If **Optimistic**, you only need to add blocked plug-ins to the INI files. If **Pessimistic**, you must give a plug-in permission to run.

- **To block with Optimistic:**

```
[PlugIns]
allow_by_default=1 or deny_by_default=0
EVIL_PLUGIN=0
```

- **To allow a plug-in with Pessimistic:**

```
[PlugIns]
deny_by_default=1 or allow_by_default=0
GOOD_PLUGIN=1
```

Adding a Local Plug-in Directory

By default, the plug-in directory is under SysDir/Plug-ins. For server installs, this means that all users have the plug-ins under that folder. If users want to add their own local plug-in directory, they could add it to the user INI:

```
[PlugIns]
LocalPath=c:\personal\GMPlugIns
```

The user still gets the global level programs (assuming they are not blocked) so ensure there is no duplication.

Security

The ShowActvForCurtained setting in [GoldMine] section of the GM.ini file lets you specify whether or not the calendar shows activities linked to completely curtained contacts. Set this field to 1 if you want the calendar to show activities linked to completely curtained contacts. For example: [GoldMine]

ShowActvForCurtained=1

Warning: Storing this setting in GM.ini means that GM.ini must be read-only for all except administrators/masters. This weakens GoldMine security.

Troubleshooting

Troubleshooting iCalendar Integration

General iCalendar Information

- iCalendar supports plain text messages; therefore, the notes in updated messages display the notes in HTML source code.
- Error message when importing iCalendar records: **Unable to parse the iCalendar message!** You get this message if the Attendee field is blank in the iCalendar record. This includes creating the event in Outlook with blank attendees, saving it as an iCalendar (.ICS) file, and importing it into GoldMine. GoldMine honors the iCal standard

that requires as least one attendee. Imported iCalendar records must have at least one attendee.
- If your system time zone settings are not configured to automatically adjust the clock for daylight savings changes, the scheduled time for an iCalendar meeting request retrieved by GoldMine is not correct. Ensure all computers are set to adjust for daylight savings changes.

Outlook

- If the Outlook organizer sends a meeting request to a GoldMine user and the GoldMine user sends a counter-proposal or deletes the meeting request, the Outlook organizer receives an iCalendar message indicating the meeting request was updated or declined. The message does not have any options of Accept, Tentative, Decline or remove the original meeting request from the Outlook calendar.
- Outlook XP organizers on Exchange (not POP3) have the above button options, but receive the message, "As meeting organizer, you do not need to respond to the meeting." Clicking OK to the message does not update the Outlook calendar record.
- Outlook XP organizers on Exchange (not POP3) can schedule meetings with GoldMine recipients; however, when the recipient sends a reply, the messages are not available in the iCalendar e-mail retrieved by the Outlook organizer. If the Outlook organizer is using Internet POP3, the iCalendar messages are retrieved.
- The notes from Outlook XP recipients on Exchange (not POP3) display in the online preview but are not available once the message is in the Inbox of the GoldMine organizer. If the recipients are using Internet POP3, the notes are included.
- A meeting request for a recurring event scheduled to occur every 2 years is not recognized as an iCalendar message by Outlook. Outlook users in workgroup mode are not affected.
- Outlook does not properly schedule weekly and monthly recurring meeting requests through iCalendar if the Outlook XP is not configured to use iCalendar as the default for scheduling recurring events. Select **When sending meeting requests over the Internet, use iCalendar format** in the calendar advanced options.
- If you do not have the above options selected and are using Outlook with a POP3 account, GoldMine does not recognize the meeting request as an iCalendar message and the message will not have the iCalendar buttons.

Lotus

- Lotus Notes does not support counter-proposals by recipients. If the organizer of a meeting request is a Lotus Notes user sending a meeting request to a GoldMine recipient and the recipient proposes a new date and time, the Lotus Notes user receives a message that the new meeting notice was been auto-processed; however, the date and time in the Lotus Notes calendar are not updated.
- Lotus Notes does not accept recurring meeting requests from GoldMine organizers. If a GoldMine organizer sends an iCalendar recurring meeting request to a Lotus Notes user, Lotus Notes is unable to process the notice, and if the Lotus Notes user sends the prompted message back to the organizer, the GoldMine organizer receives an iCalendar message that the message cannot be displayed.

- Lotus calendar items scheduled without any "invitees" get scheduled in GoldMine 'unlinked' when imported as an iCalendar file. Note that when selecting the item from the GoldMine **Import from an iCalendar file** window, the Organizer is listed as "unknown". If you open the Lotus exported iCalendar file with Notepad, note the items scheduled unlinked contain the line: ORGANIZER:MAILTO:Unknown (if the e-mail address is listed as the organizer, GoldMine will link the Lotus calendar item to the contact record that owns this address).

Troubleshooting Other Errors

Problem	Recommendations
Disk Compression	If possible, do not use disk compression software with GoldMine. If you must, place GoldMine in an uncompressed partition of your hard drive, and place other software applications in the compressed partition. Contact the vendor of the compression software for more information.
Cross-Linked or Truncated Files	Run the ScanDisk diagnostic program to test your hard disk.
Corrupted GoldMine Program File	Install GoldMine into a directory other than the existing location; for example, c:\Temp\ and copy the .dll and .exe files in to the GoldMine directory. Ensure users are not logged on to GoldMine at the time.
Low Memory	Quit running programs. Start Windows with no programs running.
Out of Disk Space	Open Windows explorer and right-click the GoldMine directory and Properties. On the General tab, used space, should be at least 32 MB.
Incompatible or Conflicting Video Driver	Some video drivers supplied with Windows can cause GoldMine data such as dates and times to appear dimmed and cause IPF errors. To change your video driver to the standard VGA driver in Windows: 1. Open the **Control Panel**. 2. Double-click the **Display** icon. The **Display Properties** dialog box appears. 3. Click the **Settings** tab. Select **Change Display Type**. 4. In the **Select Device** dialog box, select **Change** and **Show all devices**. 5. Scroll through the **Manufacturers** pane to select **Standard Adapter Type**. 6. In the **Models** pane, select **Standard Display Adapter (VGA)**. Apply the selection. If changing the video driver corrects the problem, contact the manufacturer of your video card for an updated video driver.
Low Memory	A low memory/low disk space error message may be due to an overloaded mailbox because an e-mail message did not have a stop bit. Quit all running programs and start Windows. If the error does not occur again, start each program that was running when the error occurred to determine which program may have caused the error. If the problem occurs again, continue troubleshooting. In Windows Explorer, select **Help>>About** to check that at least 16 MB of physical memory is free. If not, close applications and then reboot Windows to free memory. Run a diagnostic that checks memory. Replace failed memory.
Over Inflated History File	Zip the history file and unzip it to reset the end-of-file marker.

TSR or Device Driver Conflicts with Another Program	Start or boot your computer from a standard boot floppy diskette that contains a Config.sys file with only Files, Buffers, and HiMem settings and an AutoExec.bat file that loads only essential network drivers. If unavailable, ask your system administrator or computer consultant for help in making a standard boot disk.
Corrupted RAM or Hardware Problem	Test RAM and hardware with a hardware diagnostic software.
Windows is Using an Incorrect .DLL File	An error can result if Windows uses a .dll file with the same name as one of GoldMine's .dll files. Only these .dll files should be found in the GoldMine directory: ▪ DunZip32.dll ▪ DZip32.dll ▪ GMDB32.dll ▪ GMNU32.dll ▪ GMRE32.dll ▪ GMTB32.dll ▪ INETWH32.dll ▪ PMSDK16.dll Check for these .dll files in the Windows\System directory and all directories contained in the path environment variable. If you find any in a directory other than the GoldMine directory, copy them to a disk, and delete the files from the hard disk.

Microsoft WordBasic Errors	Description	Correction
Error 102	The template does not have a link between GoldMine and Word. This may occur if a user edits a template from the Merge Forms dialog box but saves the merged text document as a Word template, which would not save the necessary DDE field codes. Make sure both Word and GoldMine are running to see if the template was updated.	1. From Word, select **File>>Open**. 2. The **Open** dialog box appears. Ensure **Files of type** shows **Document Templates (*.dot)**. 3. Select the template file in the browse window. Click **Open**. 4. Change the active contact in GoldMine. Check that the recipient's name in the template changes accordingly. ▪ If so: From Word's main menu select **GoldMine>>Save as GoldMine Form**. ▪ If not: From Word's main menu select **GoldMine>>Update GoldMine Form**. 5. The **Summary Info** dialog box appears. Complete the entries and click **OK**.
Error 124	Appears when opening a	From Word's main menu, select

	template for the first time. The template was not updated.	**GoldMine>>Update GoldMine Form**.
Error 124	Appears for a template used successfully. A failure of the DDE link occurred between GoldMine and Word.	Reinstall the link.
Error 502	Appears during a Mail Merge. Communications link between Word and GoldMine fails, or GoldMine is too slow to respond to Word's request for data. If a filter is activated with selection criteria that selects a small percentage of the database, GoldMine may need time to perform the search and selection process. The time required for selecting records that match the filter criteria might cause Word to "time out."	Instead of using a filter for a small percentage of records in the database, speed processing time for the merge by either: ▪ Building a group based on the filter and using the group to perform the mail merge. ▪ Setting limits on the filter to speed selection time, if possible.
Error 1535	During a multiple mail merge, the template's DDE codes were changed and saved.	Replace DDE links (also known as field codes). 1. With the template open in Word, from the main menu select **Edit>>Select All**. 2. The field codes appear as highlighted text. Right-click field codes (highlighted text) to display a local menu. 3. Select **Toggle Field Codes**. To ensure you correct the error, replace all the field codes in the template. 4. Select the entire field code. From the main menu select **Insert >>GoldMine Field**. 5. The **Insert GoldMine Field** dialog box appears. Select the field code that originally was selected for the field. Click **OK**. 6. Repeat selecting and replacing field codes until all field codes are replaced. 7. From the main menu select **GoldMine>>Update GoldMine Form**. The **Summary Info** dialog box appears.

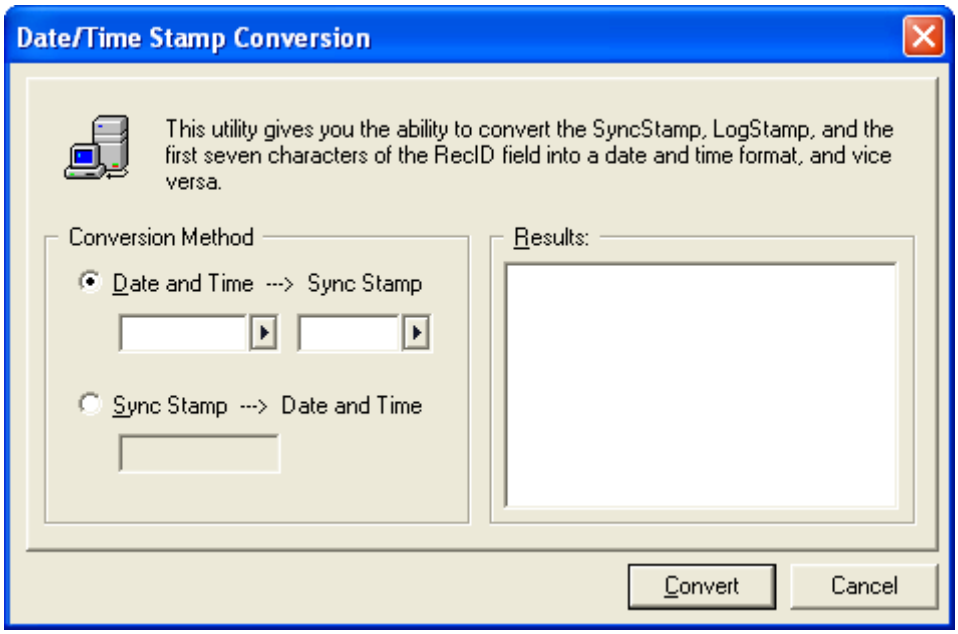
8. Complete entries and click **OK**.

Using the Date/Time Stamp Conversion Utility

You may need to view date and time stamps in a regular date format. The utility converts the seven-character SyncStamp, LogStamp, or the first seven digits of the RecID to a standard date and time format; or it converts a standard date format to a stamp format.

Tip: Use this utility while troubleshooting synchronization issues to verify the date and time in the Tlogs of unpacked transfer sets and compare the information to that in the database.

1. Select **Tools>>Synchronize>>GoldSync Administration Center**. The **GoldSync Administration Center** window appears.
2. Right-click the **Site Group** and **Server** area and select **Date/Time Stamp Conversion**. The **Date/Time Stamp Conversion** dialog box appears.


Date/Time Stamp Conversion
This utility gives you the ability to convert the SyncStamp, LogStamp, and the first seven characters of the RecID field into a date and time format, and vice versa.
Conversion Method
Date and Time ---> Sync Stamp
Sync Stamp ---> Date and Time
Results:
Convert
Cancel

3. In the **Conversion Method** area, select one:
   - **Date and Time --> Sync Stamp:** Converts the date you select from the F2 Lookup calendar and the time from the F2 Lookup graphical clock to a date stamp format.
   - **Sync Stamp --> Date and Time:** Converts a date stamp to a standard date and time format.

4. After selecting the date and time or typing the sync stamp, click **Convert**. The conversion displays in the **Results** area with your initial input on the left and the conversion to the right of the arrow. The results box displays multiple results so you can track the time stamps you are researching.
5. Click **Cancel** to close the dialog box.

Viewing System Logs

GoldMine records system activity for a variety of operations in System Logs. To view a system log, select **Go To>>Logs>>GoldMine Logs**. The left pane displays the log types and the right pane displays the details. To see details, expand the log type until you locate the day to view. Select the day; details appear in the right pane.

The **System Logs** window displays these log types:

- **Process Monitor Logs:** Activities recorded in the GoldMine Process Monitor.
- **Maintenance Logs:** Dates and outcomes of database maintenance procedures.
- **Users' Login Logs:** Users' login activity.
- **Sync Wizard Logs:** Dates and details for GoldMine synchronization.
- **GoldSync Logs:** Details about GoldSync synchronization.
- **Contact Files Logs:** Changes made to the Contact Set files.
- **GoldMine Files Logs:** Changes made to GoldMine files.
- **Error Logs:** Details of errors.

Use the logs for troubleshooting. To prevent performance problems, periodically purge the logs.

Troubleshooting SoftPhone

To capture a snapshot of network activity, you may want to try a network protocol analyzer such as Ethereal (http://www.ethereal.com). This will allow you to capture your network activity and send it to FrontRange support.

Synchronization

Troubleshooting Synchronization

Evaluate the three basic phases to determine where the process is failing:

- Creation of the transfer set
- Transmission of the transfer set from the sender to the receiver
- Retrieval of data from the incoming transfer set

Testing each phase may help narrow the failure to a particular stage. For example, to test the creation of the transfer set, create it manually. To test the transmission of the transfer set, send it to the recipient using another transmission method. To test the retrieval of the data, unpack but do not retrieve the transfer set. When you view the contents, are the records you expected to receive in the transfer set?

Troubleshooting tools for synchronization include the Sync Spy and the Sync Retrieval Logs.

Issues Icons

The GoldSync Administration Center helps users identify sites improperly configured or those with no associated process configured by displaying an alert icon for the site, known as Issues icons.

Site Group or Site Group Member Issue Icon: Indicates an issue exists with the Site Group or Site Group Member configuration. The Tool Tip provides a summary of how to configure the site group or site group member appropriately.

Sync Log Error Icon: Indicates an issue exists with the sync session for the site group member highlighted in the GoldSync Component pane. Enable log details for the site for information on the error. Double-click the sync session and GoldSync separates the error message from the other logs for easy identification.

Tip: Search for common error messages on our Knowledgebase at **support.frontrange.com**. This database is continuously updated with possible resolutions to error messages.

Troubleshooting Synchronization Customizations

Issue: User-Defined Field Values Not Being Retrieved

This issue often occurs when a user on one system creates custom fields and starts entering data into those fields before synchronizing the field changes to the remote. When customizations and Contact2 data are included in the same synchronization session, GoldMine retrieves the user-defined fields, and the Process Monitor displays the message ***The Contact2 file structure has changed. The file will be rebuilt when all processes are done***. GoldMine continues retrieving the remaining data from the transfer set including the Contact2 information.

However, the new fields are not yet added to the Contact2 table, and there is no place to put the new data. When finished synchronizing, GoldMine prompts the user to rebuild and add the fields to Contact2, but by then it is too late to retrieve the data for those fields.

To prevent this type of issue from occurring, ensure remote users have retrieved the field modifications before synchronizing the data.

To synchronize customizations to remote computers:

1. Synchronize just the customizations.
2. Synchronize the data.

After creating new fields, create a transfer set of the customizations without the data. This transfer set should be sent to all remote users and retrieved by those users prior to retrieving Contact2 data. If the user is not prompted to rebuild after retrieving the transfer set, make sure fields and user-defined fields are selected in the **Retrieve Options**. In this case, the transfer set must be retrieved again with these options selected.

If you encounter a situation where synchronizing both field changes and the Contact2 information in the same synchronization session was attempted, set the cutoff date back and synchronize the Contact1 and Contact2 information again. It may be necessary to purge the Tlogs on the remote site prior to re-synchronizing the primary contact information. For a new system, this step is fine.

Warning: For existing systems, think twice before purging Tlogs—especially on the server—because purging usually causes more problems than it solves.

After a purge, changes made to system fields in the primary Contact record do not sync. This usually happens because most GoldMine systems have the same RecID for these fields. The user sets the cutoff date to 1/1/1980 and all changes are sent as **zztemp**, the RecID exists in the

retrieval, and no changes are retrieved. The sending system must send updates. Purging Tlogs also causes this problem because all updates were purged.

Troubleshooting Transfer Set Creation

Symptom	Probable Causes	Action
Changed records are not included in the transfer set.	The record selection options are not set to include the missing records. For example, the cutoff date may be set to after changes were made to the records, or the applied filter does not include the records.	Edit the Site Group or Site override options to include the missing data. For example, set the cutoff date back; or test the filter outside of GoldSync and verify the records are included. Also, turn on the logging options in the Synchronization Wizard, Site Group, or Site override options. The logs display a record count for the process and display the results in the GoldSync or Sync Wizard logs.
Transfer set is not created successfully.	GoldSync is not configured correctly to generate the appropriate transfer set.	Edit the synchronization configuration to include the missing databases.
Linked documents are excluded from the transfer set when running GoldSync as a Service.	The logon for the GoldSync Service in the Services management window is configured as a Local System account.	Change the logon for the GoldSync Services in the Services management window from Local System account to This account. Configure the This account login with a user who has full access to the GoldSync computer and the shared mapped drives and UNC locations where linked documents are stored.

Troubleshooting Transfer Set Retrieval

Use the **Sync Retrieval Logs** as a troubleshooting tool.

Symptom	Probable Causes	Action
Remote Site did not successfully retrieve the transfer set.	Transfer set decryption failed because the sending system and the retrieving system are:	
	▪ Using different versions of	Install the latest version of GoldMine on the system running an older version.

	GoldMine.	
	▪ Using different passwords.	Check the password entered in the Synchronization Wizard and the GoldSync Site options.
	▪ Using different RecID formats.	Verify the RecID formats on the two systems are in the same format. To check the RecID, select Help>>About. The About GoldMine dialog box appears. Click System. The CAL LangDriver and Contact1 LangDriver should be set to DB437USO (New RecID).
	Transfer set decompression failed because:	
	▪ Retrieving system is using multiple or outdated versions of dzip32.dll and dunzipt32.dll.	Delete the multiple instances of the files exist outside of GoldMine and verify the date is 10/31/1999.
	▪ GoldSync cannot locate dzip32.dll or dunzip32.dll.	Check the path for the system files against the actual location of files. They should be located in the GoldMine directory.
	▪ A Tlog record indicates the record was not updated because it was deleted.	Check the ContTLogs table or the GMTLog table corresponding to the records that are not updating on the retrieving system. Tlogs with zzzDel indicate that the record was deleted.
Compression and decompression errors	Incompatible versions or multiple copies of dzip32.dll and dunzip32.dll.	Check: ▪ Is the GM.ini using mapped drives instead of UNC paths? ▪ Is the system running only one copy of dzip32.dll and dunzip32.dll, and are they located in the GoldMine directory? ▪ Is the system using the same versions

		of the dzip32.dll and dunzip32.dll as the system that sent the transfer set?

Troubleshooting Transfer Set Transmission

Symptom	Probable Causes	Action
Transfer set is not sent to the receiving system.	Failed to connect to the remote. The transmission system, such as network connectivity or Internet server, is not operating. POP3/SMTP servers are not working.	Check the Process Monitor for details about the connection. If no connection was established, check the settings in the GoldSync Administration Center or the Sync Wizard.

Tlogs and the Synchronization Process

Transfer logs (Tlogs) contain a copy of the unique RecID value of any record modified, added, or deleted in a GoldMine system. They also record the date and time of these changes to the GoldMine data.

The date and time stamps in the Tlog files are critical to synchronization. Consider these basic steps of every synchronization process:

1. The transfer set creation process examines the Tlog files to determine which records to include in the transfer set.
    - Tlog records with SYNCSTAMP values more recent than the cutoff date are included, provided they are not excluded by a filter or other user setting.
    - The RecID method includes records not having Tlog entries.

2. The transfer set is created.
    - It includes the Tlog records for the data synchronized and the data itself.
    - Special Tlog records are created in the transfer set with a **zzTemp** stamp are created for data included by the RecID method.

3. The transfer set is exchanged with another GoldMine system.
4. The remote system retrieving the transfer set evaluates data in the transfer set against data already in that system.
    - Records in the Tlog files are matched based on their FRecID values.

- The **LogStamp** values of matching Tlog records are compared to determine which copy of the record is more current.
- The most current copy of the record is kept. The data and the corresponding Tlog are imported/retained at the retrieving system.
- **zzTemp** stamped records are retrieved only if a copy of the record does not already exist on the retrieving system or if no Tlogs exist.

Note: Each step relies on the Tlog files to function properly; it is critical these files be maintained and backed up regularly.

Using the Sync Spy

When synchronizing records you may need to use the **Sync Spy** to check the records updating in the sync logs. Use Sync Spy to view the sync stamp, log stamp, field name, and user.

Note: With Sync Spy you determine if there is a sync stamp for the field and whether you set the cutoff date back far enough.

The **Sync Spy** window contains an upper and lower pane. The upper pane is summary information for the active Contact Record. The lower pane reflects the information stored in the Contact file Tlogs (ContTlog). This log file holds synchronization information for the contact set. Each contact database has its own ContTlog file.

1. Select **Tools>>Synchronize>>Sync Spy**. The **Sync Spy** window opens.
2. On the Contact Record for which you are checking the updates, click the field in question.
    - **Database:** Name of the database you are currently evaluating.
    - **Sync Stamp:** The date and time when the field was synchronized from the remote site and the date and time the field was modified by a user local to this system.

    Note: On the transfer set creation side, the Sync Stamp is used with the cut-off date and time to determine if the field-level change should be included in the transfer set.

- **Log Stamp:** The date and time when the field was modified by a user local to the system the Sync Spy is run on.

  Note: On the retrieval system, the Log Stamp is used to compare which system has the latest change.

- **Field Name:** Field modified in the selected database.

  Note: Curtained fields are viewable in the Sync Spy. If this is a security concern for your organization, disable the Sync Spy option for non-Master Rights users you do not want viewing the fields. Select **Tools>>User Settings**. Highlight the user and click **Properties**. Click the **Menu** tab and expand **Tools**. Disable the **Sync Spy** menu option for the user.

- **User:** User who made the modification to the field. Also shows if the modification was made by a remote or local user. If the name includes a ~ (tilde) character, it indicates the field was updated locally.

3. To select a database for the Sync Spy to display if values for the tab are stored in more than one database, select the **Database** in the drop-down list. For example, the Fields tab information is stored in Contact2. Select Contact2 from the drop-down list to view the values.
4. To view field values stored in another database, click the tab containing the values to view.
5. To display data in the Sync Spy for another contact, click the Contact Record and scroll through the database.
6. Use the local menu to access Find and Output options.

Viewing the GoldMine Files Logs

The **GoldMine Files Logs** display records from the GMTLog. It contains changes to the Cal, Contudef, and Mailbox files.

1. Select **Go To>>Logs>>GoldMine Logs**. The **System Logs** window appears.
2. Expand **GoldMine Files Logs**. Select a table and then select Today, Yesterday, This Week, year, month, or day.
3. The right pane displays:
    - **Sync Stamp:** Date and time the record last synchronized.
    - **Log Stamp:** Date and time the record was changed.
    - **User:** Name of the user who created or modified the record.
    - **Current Field Value:** Entry in the Field Name field of the ContTLog.
    - **RecID:** Record number uniquely identifying the record. The first 7 characters represent the creation date and time.
    - **Company:** Entry in the company field of the Contact Record.
    - **Contact:** Entry in the Contact field of the Contact Record.

Viewing the GoldSync Logs

The **GoldSync Logs** display synchronization activity executed through the GoldSync Administration Center.

1. Select **Go To>>Logs>>GoldMine Logs**. The **System Logs** window appears.
2. Expand the **GoldSync Logs**. Select year, month, and day back to the purge date.
3. The recorded logs display in the right pane.

SQL Deadlock with E-mail Forwarding Rules

There are three sets of e-mail rules:

1. **Global Primary-A** first set of e-mail rules that execute before any others.
2. **Private-A** set of personal e-mail rules that execute after the global primary e-mail rules.
3. **Global Secondary-A** third set of e-mail rules that execute after the private e-mail rules.

When setting up your e-mail rules, be careful to avoid logical errors. For example, problems may occur if you set up two rules to trigger the following within the same category:

Rule 1-Send rule: If private, forward to UserA.

Rule 2-Send Rule: If UserA, Mark as Private.

If a loop occurs, your mailbox fills up and the server might crash. It can also cause a lock on the mailbox and/or history table. Such loops are not caused by a GoldMine bug; they are normal and logical results of the configuration.

Licensing

About Licensing

GoldMine has a fully scalable licensing structure to meet the needs of individuals and organizations. As your business matures and GoldMine expands, your organization can change the licensing configurations.

General Information

The single, distributed Master License serves as the authentication mechanism for secure synchronization across the entire organization, and the License Manager keeps track of your licensing configurations.

Most organizations generally buy one license—a Master License with X number of seats. These seats can then be parsed to users in various combinations of sub-licenses. For example, an organization can create Site sub-licenses for their remote office(s) and Undocked sub-licenses for individual remote (mobile) users. One seat should always be set aside for administrators.

License Types

Master License: This is the primary license. It determines what database types are supported by the master site as well as its synchronization capabilities. It is a precursor to executing any sub-licenses which stem from it.

GoldSync and Outlook Integration licenses are issued concurrent with the E or D license.

The licensing serial number schema for Master licenses has been changed for the 7.0.4 release, but remains the same for sub-licenses. See License Serial Number.

Sub-licenses: To issue one of these, install GoldMine with a Master License on your organization's primary network. This ensures all sub-licenses maintain security and are authenticated properly during synchronization.

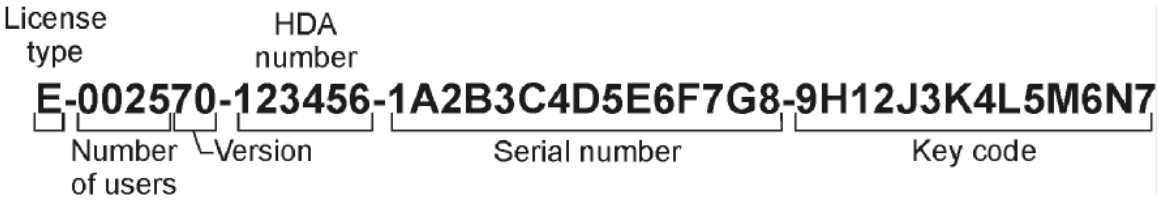
The Undocked license (a special sub-license) is for remote users and can only be licensed for a single user. It can be sub-licensed from the main GoldMine system or from a Site sub-license.

Increases: Previous increases for Corporate Edition, Standard Edition, and GoldSync (J, R, and N), are now facilitated by obtaining a new E, D, or G license (which account for the increase and the Master license count).

Master Licenses		
E	Corporate Edition License	Supports SQL Server and Firebird databases. Includes GoldSync.
G	GoldSync License	GoldSync seat purchased separately and can be added to E-Licenses.
O	GoldMine Outlook	Outlook integration purchased separately for an E-License.

	Integration Services License	
Sublicenses		
U	Undocked License	Single sub-license for a remote GoldMine user.
S	Site License	Multiple-user sub-license for a remote office.
Y	GoldSync License	GoldSync sub-license for a remote office.

License Serial Number



License type: Alpha-prefix denotes the type of Master license.

Number of users: First 4 numbers indicate the license count or seats available in the license. The license count determines the number of users who can log on to GoldMine at one time but does not limit the total number of named users.

Version: A 2-digit version number.

HDA number: Your 6-digit HDA number.

Serial number: 15-character (alphanumeric) serial number uniquely identifying the license for an organization. It is used for registration and support and identifies all sub-licenses as part of the same organization. Collected in 3 groups of 5 characters during licensing.

Key code: 15-character (alphanumeric) key code is a computer-generated check used by GoldMine to verify the license's validity. Collected in 3 groups of 5 characters during licensing.

Note: The key code is required during installation. Keep the license number and key code in a safe place in the event it becomes necessary to reinstall the software.

License Manager

Initial licensing information is collected during installation. Subsequent changes and related management functions are handled through the License Manager.

From the GoldMine **File** menu, select **Configure**>>**License Manager**.

The central text box lists all installed licenses and any sub-licenses created from this location. Status is displayed along the right side. Buttons along the bottom allow you to add a **New License**, add a **New Site**, add an **Undocked User**, **Remove License**, or **View License**.

The database support of the Master License is inherited by the site sub-licenses distributed throughout the organization. GoldSync Synchronization capabilities can be distributed separately to sub-licenses.

Important: Licensing information is stored in the license file, **License.bin**, created at the time you register. This file must exist only in the GoldMine root directory of each GoldMine installation.

Master License

- A GoldMine Corporate Edition Master License begins with the alpha-prefix E (Example: E-0050-111111).
- The E-license is usually a multi-user license for a server installation of GoldMine but may be a single-user license for a stand-alone computer.
- An E-license includes a GoldSync license for each purchased GoldMine seat.
- Remote site sub-licenses (S- and Y-licenses) and Undocked sub-licenses (U-licenses) are created from the E-license.
- Type the E-license number and key code you received when you purchased the software.
- If you type an E-license serial number into the text boxes, the GoldSync text box area remains unavailable because GoldSync is included. However, it must be purchased separately with a D-License, so while typing the serial number in the text boxes, the GoldSync area becomes available. Type your G-license information at that time, or later using License Manager. You do not need to type the G-License number to proceed with licensing GoldMine.

Using Net-Update

If you have an existing GoldMine license and have purchased an upgrade, or if you participate in the Upgrade Protection Program (UPP), use Net-Update to upgrade to the latest version.

Note: If multiple users synchronize with GoldMine, all GoldMine systems must run the same version of GoldMine.

Net-Update transmits your registration information to FrontRange Solutions, or log in frontrange.com to manually update this information.

1. Ensure your ISP is successfully connected.

2. Access Net-Update via:
   - **Tools>>Configure>>License Manager (Net-Update Tab)**
   - **Help>>Update GoldMine**

3. Select **Net-Update Now**. The **FrontRange Solutions NetUpdate System for Product Registration and Product Updates** Web page appears.

   Note: If you are using License Manager, select the **Update registration information** check box to update with the information in the Registration tab if appropriate.

4. Use Net-Update to register GoldMine, update your version of GoldMine, or view options to upgrade your GoldMine system.

Using the License Manager

Purchase GoldMine with a Master License serial number to provide maximum flexibility for an organization in controlling the data integrity and security for each user.

Example: Purchase a 50-user GoldMine license and a 50-user GoldSync license. Install once on the network. Then, create two 10-user sublicenses for the 2 branch offices from the Master License. Then, create undocked sublicenses for the notebook PCs of undocked users. Each license created from the Master License shares the same GoldMine serial number to provide authentication, ensuring secure remote synchronization throughout the organization.

Select **Tools>>Configure>>License Manager**. The **GoldMine License Manager** dialog box appears.

Note: Also display License Manager from the Undocked Users/Sites dialog box of the GoldSync Site Wizard. Select Undock Users/Create Sub-License.

Master License

- **Total users/dist:** Total available GoldMine E- or D-Licenses and the number of licenses distributed (S or U).
- **GoldSync Sites:** Total number of GoldSync G-Licenses and the number of licenses already distributed (Y).
- **Authentication:** The code randomly generated upon installation and used by GoldMine to verify sublicenses were created from the same Master License during synchronization. Reinstalling the Master License generates a new authentication number and renders all sublicenses incompatible.
- **Databases:** Database types supported by the current license (Firebird or SQL Server).

Distributed Licenses

- **Undocked Users:** Number of Undocked license numbers created.
- **Remote Users/loc:** Remote users and total number of sites where these users are distributed.
- **GoldSync Sites/loc:** GoldSync sublicenses and the number of sites for these licenses.

Note: A maximum of 16 licenses can be combined within the License Manager.

Tasks

- Create New Site sublicenses for branch offices (Master Rights required).
- Create Undocked User licenses for remote users working offsite (Master Rights required).
- Remove a license (Master Right required).
- Upgrade your copy of GoldMine with the latest version using Net-Update.
- Install GoldMine to a local workstation.

About Sub-licenses

With multiple offices and users, create sub-licenses for each site or user from the Master License. A site sub-license installs that license on only one remote server. An undocked user sublicense installs that license on one remote computer. However, create multiple site licenses and undocked licenses up to the maximum permitted by the Master License.

Site License

A Site License is a multiple-user sub-license for a remote office and is designated with the alpha-prefix “S.” Have an S-license for each user at the remote site.

- When creating any sublicense, note the entire license number created by GoldMine. The sub-license includes additional information needed when typing the license number on the remote computer and displays in its entirety during the creation process.
- A GoldSync License (Y-license) is required only if you are using an S-license and want to synchronize using GoldSync. You should have one Y-license to synchronize with the Master License and additional Y-licenses for Undocked users synchronizing with your site.

- Y licenses are not entered in the Enter GoldMine Serial Number dialog box. Only S licenses are entered during registration (the GoldSync Section remains disabled). Clicking Next displays an ALERT: Suggested Action(s)! if you attempt to enter Y licenses in the Enter GoldMine Serial Number dialog box.
- If this installation of GoldMine includes its own GoldSync sites, you may enter the applicable Y-type sub-licenses to properly configure synchronization for this system.

Tip: Highlight the complete serial number in GoldMine, copy it (CTRL+C) and paste it (CTRL+V) into Notepad.

Undocked License

Undocked licenses are sub-licenses created from a Master License or a Site license and are designated by the letter “U.” This license type is created for users who work with GoldMine at another location, on a laptop, or on a workstation disconnected from the server copy of GoldMine. Type the U-license, Key Code, and Site Code created in the License Manager.

Creating Site Licenses

1. Select **Tools>>Configure>>License Manager**. The **GoldMine License Manager** dialog box appears.
2. Select the **Licenses** tab and click **New Site**. The **Create a Site License** dialog box appears.
3. From the **Distributed License Type** area, select **GoldMine Site License**. Instructions for creating the GoldSync License follow.

4. Type the **Site Name**. The name of the site should have no more than 12 characters and spaces, such as Los Angeles.
5. Type the **Number of Users** who will need seats at the site. This will be the total number of users included in the sublicense.
6. Click **Create Site Sub-License**. The **Sub-License for Remote Site [site name]** dialog box appears. Select **I AGREE** if you accept the licensing terms.
7. GoldMine displays the new sublicense for the remote site, beginning with the letter **S**, in the field at the bottom of the dialog box. Make a copy of this number; you need it when licensing the site. When finished, select **Close**.

Note: A unique sublicense number is needed for each remote computer installation. Send the remote site number to the remote location. The GoldMine administrator at the remote site can then type the license number during the GoldMine installation.

8. To complete the process, click **OK** in the **Create a Site License** dialog box.
9. GoldMine adds the sublicense to the Licenses tab browse window under previously installed license(s). The first character of a site sublicense serial number is **S**.
10. To synchronize between the remote site and the Master License site, you need at least one GoldSync License.

Creating Undocked User Licenses

GoldMine has a sub-license for an individual user called an Undocked License (U-License). This license type is created for users who work primarily with GoldMine at a remote location on a laptop, notebook, or home office computer but who may also need to log on to the network occasionally. Consider:

- Creating an undocked user decreases the available users of the network site (Master License or Site License) by one; however, when an undocked user logs on to the site from which they were sub-licensed, they do not take up an additional seat.
- Every user supported by the GoldMine license can have an Undocked license to work on a remote computer. For example, on a 5-user GoldMine system, 5 Undocked licenses can be created. This is in contrast to creating an “S” sub-license which requires one seat to remain available from the Master License.
- All undocked users, as well as the total number of users that make up the difference in the total number allowed by the Master License can log on to GoldMine. For example, on a 5-user GoldMine system with 3 undocked users, 3 undocked users plus 2 other users can log on to GoldMine.
- If you undock all users, only those users will be able to log in. If you have not assigned master rights to any of those undocked users, GoldMine administration cannot take place.
- When used in combination with GoldSync, administrators can synchronize security settings to undocked users including new passwords, menu items, and preferences in addition to data.
- To work on an undocked basis, users must have an Undocked license on their laptop. Create an Undocked license from the Master License or a Site license.

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1. From the GoldMine main menu, select **Tools**>>**Configure**>>**License Manager**. The **License Manager** appears.
2. Click the **Licenses** tab and **Undock Users**. The **Create Undocked User Licenses** dialog box appears.
3. Select the check box next to the user you want to create a sub-license for, and click **Create Undocked License**. The **Sub-Licenses** dialog box appears.
4. Review the information and click **I Agree**. The sub-license number for a remote user or an undocked user appears in the **Sub-license for Remote Site [Name of Site]** dialog box.

Write the sub-license number down or copy it to Windows Notepad. The sub-license number is needed for each remote computer installation. Send the remote site license number to the remote user who can type the license number during the GoldMine installation.

Creating GoldSync Licenses

1. From The **GoldMine License Manager**, select the **Licenses** tab and click **New Site**. The **Create a Site License** dialog box appears.

2. In the **Distributed License Type** area, select **GoldSync Site License**.
3. Type the **Site Name** (no more than 12 characters and spaces).
4. Type the **Number of Users** who will need GoldSync licenses at the site (the total number of users included in the GoldSync sublicense). The site needs at least one GoldSync license to synchronize with the Master License.
5. Click **Create Site License**. The **Sub-License for Remote Site [site name]** dialog box appears.
6. Select **I AGREE**.
7. The new GoldSync sublicense for the remote site displays. Copy of this number, beginning with the letter **Y**; you need it when licensing the site.

Note: A unique sublicense number is needed for each remote computer installation. Send the remote site number to the remote location. The GoldMine administrator at the remote site can then type the license number during the GoldMine installation.

8. Click **Close**.
9. Select **OK** in the **Create a Site License** dialog box.
10. GoldMine adds the sublicense to the **Licenses** tab under previously installed license(s).

Updating Undocked Users

Caution: Do not allow undocked users to synchronize with an updated GoldMine system until that undocked user has updated to the same version the updated site is using.

To update undocked users after performing a NetUpdate on the main GoldMine system, locate the gmsetup.exe file. Depending on how undocked users communicate with the network and GoldMine system and on the connection speed, send the gmsetup.exe file to the undocked user by putting it on CD, posting it on an FTP site, e-mailing it, or placing it on an accessible network drive.

Include directions on executing the gmsetup.exe file and what undocked users should expect after the upgrade.

After the undocked users update to the same version of GoldMine, they can use NetUpdate to sync with the master site.

To perform the update, click **Net-Update Now** and follow the prompts. To change the registration information, select **Update Registration Information**.

Installing GoldMine on Local Workstations

Install GoldMine .exes and .dlls on the hard disk drive of your local workstation to increase response time and reduce network traffic by approximately 3-5%.

Note: If you install GoldMine locally on workstation disk drives, update each workstation whenever you update the server installation of GoldMine.

This option is available after performing a Net-Update on the server installation of GoldMine. From the server, copy the **gm7setup.exe** file to the **Setup\GoldMine** folder relative to the GoldMine root directory. **C:\Program Files\GoldMine\Setup\GoldMine** is the default location of this folder.

1. From the local workstation, select **File>>Configure>>License Manager**. The **GoldMine License Manager** dialog box appears.
2. Select the **Install Locally** tab.
3. From this tab, browse to identify the local GoldMine folder.
4. Select **Create a GoldMine shortcut on the Desktop**.
5. Select **Automatically update the local GoldMine program files**. This updates the local instance whenever the server instance is updated.
6. Click **Install GoldMine Locally** to install the .exes and .dlls on the local hard disk drive.
7. Confirm the workstation is running the same version as the server, by selecting **Help>>About>>System**. You should be using a local GoldMine EXE file, but the System Files, GoldMine Files, and Contact Files should be the network files, not local files.

Removing Licenses

In a multi-license GoldMine installation, it may be necessary to delete sublicenses such as site licenses, undocked user licenses, or GoldSync licenses. You cannot delete E, D, or G-Licenses. Only users with Master Rights can delete licenses.

1. Select **Tools>>Configure>>License manager**. The **GoldMine License Manager** dialog box appears.
2. From the **Licenses** tab, select the sublicense to delete and click **Remove License**.
3. Click **Yes**.

Integration

Integrating with HEAT

About Integrating with HEAT

If using GoldMine with an E-License on an SQL database, integrate with HEAT to:

- Launch **HEAT Call Logging** from GoldMine and access the database.
- View call ticket information on the **Tickets** tab in GoldMine (the services and support relationship with the customer).
- Transfer ticket information to the GoldMine **Details** tab using the Ticket Transfer Utility to synchronize information with remote users without access to the HEAT database.

You cannot transfer data to the Details tab unless you are running GoldMine on an SQL database.

GoldMine users with Master Rights can change the database and login using **HEAT/HEAT PowerDesk Options**.

From HEAT, users can validate from GoldMine's Contact1 table and use the Customer window to view the primary contact information from the Contact Record, additional contacts, Sales-Pending, and Sales-History .

See **HEAT Administrator Module** online Help for complete instructions.

Advantages of a HEAT Integration

Primarily, the advantage of integrating HEAT and GoldMine Premium Edition is that a single customer record exists and is shared by both applications:

- **HEAT users can view and modify certain GoldMine Premium Edition customer information:** HEAT Call Logging users can view a GoldMine customer's phone number, address, e-mail address, and so on. GoldMine can also be integrated to display a list of associated contacts for the selected Contact1 customer.
- **HEAT users can view a customer's Sales-Pending information:** HEAT Call Logging users can view a list of scheduled sales activities for a GoldMine Premium Edition customer.
- **HEAT users can view a customer's Sales-History information:** HEAT Call Logging users can view a list of prior sales activities for a GoldMine Premium Edition customer.
- **GoldMine Premium Edition users can view Call Logging Information:** GoldMine users can view call history information including information in the Detail, Journal, and Assignment tabs.

Note: The Ticket Transfer feature expands Call Logging information viewing in GoldMine Premium Edition by letting Call Record data transfer to the ContSupp table. From there, it can be displayed in the GoldMine Details tab and synchronized to remote, undocked users.

- **HEAT and GoldMine Premium Edition users can send internal e-mail messages to each other:** HEAT and GoldMine users can communicate about customers through e-mail.
- **HEAT and GoldMine Premium Edition users can post alerts to each other:** HEAT and GoldMine users can alert each other about key customer issues.

How the HEAT Integration Works

HEAT and GoldMine Premium Edition communicate by sharing information in their database tables. When integrated, an external link is created from HEAT to two GoldMine database tables: the Contact1 table, and the ContSupp table. The external link is a two-way link used to view and modify data. This lets data flow in both directions between the databases and the applications themselves.

The Contact1 Table

The Contact1 table stores information for GoldMine Premium Edition customers such as phone numbers, addresses, fax numbers, and so on.

HEAT displays Contact1 table information using the Contact1 Customer Type in Call Logging. Information displays in the customer profile (often called the Customer window). Call Logging users can view customer information.

Note: Information about pending sales and sales history also displays in the Customer window using the Sales-Pending and Sales-History tabs. This information is read-only.

Call Record information displayed in the GoldMine Premium Edition **Tickets** tab is not actually stored in a GoldMine record. Rather, it is stored in the HEAT database and dynamically viewed by GoldMine Premium Edition users. In comparison, information displayed in the GoldMine Premium Edition Details tab is stored in the ContSupp table. Information is transferred here using the Sales & Marketing Ticket Transfer feature.

The ContSupp Table

The ContSupp table stores information about a GoldMine Premium Edition customer's additional contacts and e-mail addresses for all contacts. Additional contacts display in the Contact tab in the Customer window.

Note: The e-mail addresses that autofill in the Contact1 Profile and Subset forms in HEAT Call Logging cannot be modified.

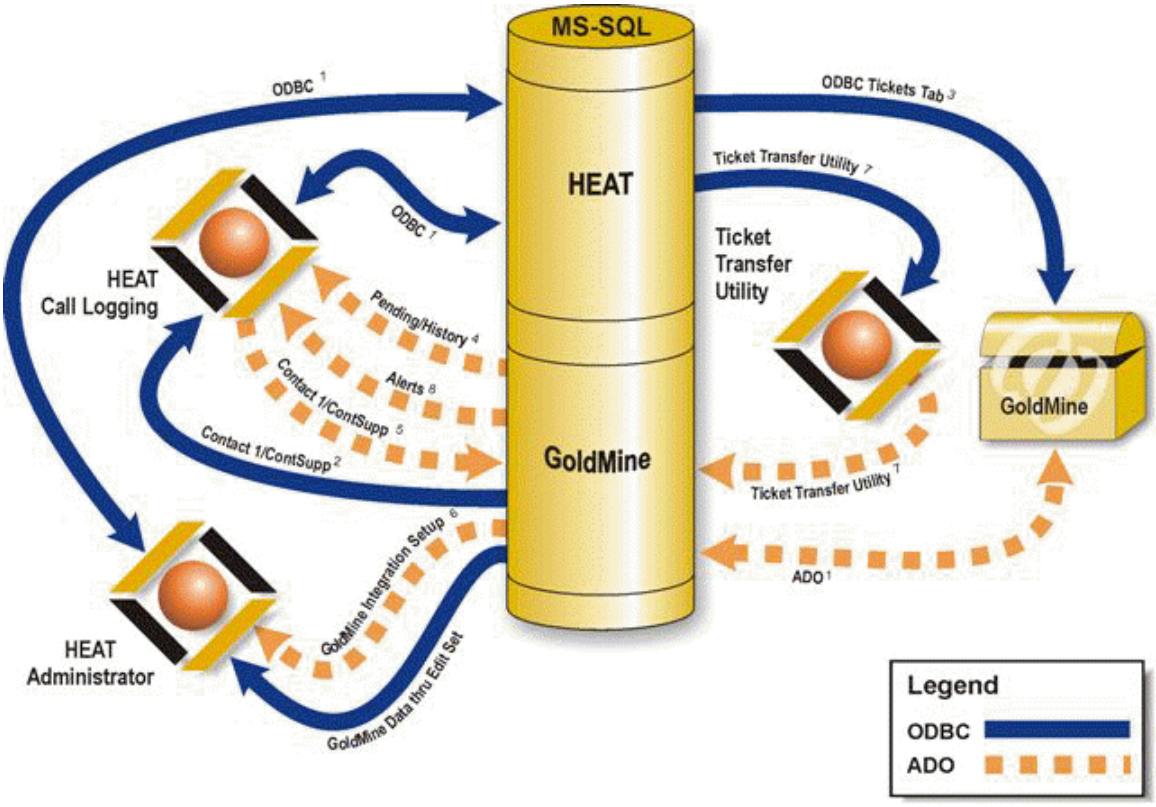
Launching HEAT from GoldMine

If using GoldMine with an E-License and you configured HEAT integration, launch HEAT from GoldMine.

1. Select **File>>Login to HEAT**.
2. **Call Logging** appears.

Ticket Transfer Utility with HEAT Integration

If using GoldMine with an E-License on an SQL database and you integrate with HEAT, the processes work together as shown.



1. Data flows two-way between the databases and the applications using ODBC between the HEAT database and the HEAT modules. It flows between the GoldMine SQL database and the GoldMine application by way of the ActiveX Data Objects (ADO).

2. Contact information is validated from the GoldMine SQL database through the Contact1 and ContSupp tables and flows to the HEAT application. This allows HEAT users to view GoldMine customer information and additional contacts.
3. Call Records created in HEAT flow to the Tickets tab in the GoldMine application by DDE and ODBC.
4. View GoldMine Pending and History activities in HEAT Call Logging (read-only). Data flows from the GoldMine database to the HEAT application by ADO.
5. GoldMine contact information and the additional contacts (Contact1 and ContSupp tables), which are created or updated in the HEAT application, are sent to the GoldMine database using ADO to transport.
6. The SPFiles table in the GoldMine database stores data that ADO can validate in the HEAT Administrator module.
7. A Call Record is created and stored in the HEAT database. The Ticket Transfer Utility converts these Call Records into detail records on the GoldMine Details tab. The data flows from the HEAT database to the Ticket Transfer Utility by ODBC and then to the GoldMine database by ODBC.
8. Alert data flows between GoldMine and HEAT Call Logging. Enable both HEAT and GoldMine to assign and display the other application's alerts.

Integrating with .NET

Integrating with .NET

The new API integrates with GoldMine by providing an XML-based programming interface and COM server. It is compatible with Microsoft .NET development tools (VB.NET and C#). The XML wrapper provides access to functions from the non-XML capable API available of previous GoldMine versions.

Also, user-interface integration tools let developers interact. For instance, replace DDE with COM, to gain:

- Implementation of current technology instead of DDE.
- Compatibility with COM-capable development tools.
- Compatibility with .NET applications.
- Ability to grow into a full UI API.
- Ability to rewrite the Excel/Word link.
- Easier implementation of an XML-based interface.

The COM server implements the relevant DDE functions. An application that previously used DDE can communicate to GoldMine using this interface.

The description has 2 parts:

- The XML API
- The UI API to run

The XML API and the UI API use the same basic schema to perform actions:

```
<GMAPI call="CallName"><dataname="DataName">XXXXXX</data>...</GMAPI>
```

Eventually, this will evolve into a "retro-written" XML-schema and DTD for the full APIs.

The XML API wraps the existing GM API into a simpler interface. Low-level functions performing actions needed by the non-XML API programmer are hidden. Failures are self-documented (no return messages).

Suggested Prerequisites:

- **Using the interfaces (developers and Technology partners):** A working knowledge of COM and XML (or ability to build well-formed XML strings).
- **End users:** A working knowledge of the standard function calls for the older gmx32.dll version of the GoldMine API.

See the Open Developer section of our support Web site at http://support.frontrange.com or our Partner section of the Web site to become a Technology Partner.

Glossary

#

.gmb: (The file extension for a backup file created by the Back-Up Wizard)

.ics: (iCalendar file extension)

A

AccountNo: (The Account Number field uniquely identifies a contact record and is the common field value that links the Contact1 table to Contact2, Cal, ContSupp, ContHist, and OpMgr)

Action: (The Automated Process action is the activity performed when triggered)

Activities: (Activities are time-specific or event-based actions linked to contacts; for example calls, appointments, letters, or other types of activities, such as To Do tasks or events that are assigned to users)

Activity list: (A window that displays task or event information. The Activity List displays eleven categories of information in a set of tabs)

Additional Contact: (Individual associated with the primary contact, such as an administrative assistant. GoldMine stores this information in the Contacts tab of the primary contact's record)

Alphanumeric characters: (Letters A - Z and numeric digits)

Attachment: (A file, for example, a Word document, created outside of GoldMine and attached to GoldMine as a linked document, InfoCenter attachment, or e-mail attachment)

Auto-updating: (Allows you complete or delete many activities or resources)

B

Bcc: (Blind Carbon Copy. A copy of a message, usually e-mail, is sent to a recipient that the main recipients cannot see)

BDE: (Borland Database Engine. Serves as a connector between GoldMine and the databases)

Break fields: (Break fields manage the grouping of information, determining how multiple entry information, such as Details, Calendar, and History, is displayed in a report template. The break field ensures that all the details or calendar entries are grouped together before moving on to the next contact record. Break fields can only be used in Sort Headers)

C

Calculated field: (Field containing a mathematical expression rather than data)

Cc: (Carbon Copy. Used in e-mail messages, memos, and letters)

Character string: (Any series of alphanumeric characters (including spaces) that are treated as a group)

Cloning: (The process of copying a user or report settings and configurations in order to quickly create a new user or report)

CommonDir: (Used in the GM.ini, the CommonDir specifies the location of your default contact files)

Contact files: (The tables storing a database's contact information. Also referred to as Common files. The CommonDir line in the GM.ini points to the default contact files)

Contact record: (Standard unit of information in GoldMine. GoldMine's contact record incorporates standard information, such as name, company, phone, and address, and also serves as the basis for all scheduled work in GoldMine, acting as the central link between GoldMine's Calendar and History by maintaining all past and pending events related to the individual contact records in the GoldMine database)

Contact set: (Database consisting of the contact information: Contact1, Contact2, ContSupp, ContHist, ContGrps, ContUdef, Conttlog, and sometimes Lookup. GoldMine allows you to have more than one contact set)

Contact tabs: (Set of tabs located below the main Contact Record containing information associated with the contact, including additional contacts, pending, and history information)

Contacts tab: (Additional contacts associated with the Contact Record)

Curtaining: See Record curtaining

Custodian: (The person responsible for the resource)

D

Database: (A collection of data fields and related tables storing information that facilitates access and retrieval)

Details tab: (Structured, user-defined information associated with each Contact Record)

Dialog field: (A field created to open a dialog box and prompt the user for parameters to include in the report)

Digital ID: (Digital signature and encryption keys sent with e-mail messages)

E

Entity: (Used to refer to a single record type. Consists of a customized combination of primary fields views, custom screens, and GM+Views)

Event: (Step-by-step instructions contained in an Automated Process, or track, that GoldMine must evaluate to perform a specified series of activities. An event consists of a trigger and an action. An Automated Process consists of a sequence of one or more events)

F

F2 Lookup: (Special type of browse window that can be customized to contain frequently used or code-specific entries. Security options can control F2 lookups to ensure user input and allow standardization of data)

Field typing: (Customizing field labels and colors using direct data or dBASE expressions)

Fields tab: (Displays user-defined fields grouped together in user-defined screens)

File code: (The unique 3-character identification assigned to each Contact Set, enabling synchronization and backing up)

Filter: (Sort condition used to select a subset of records from the entire database)

Force log out: (Forces users out at a particular time or when inactive for a period of time)

Free/busy times: (Free and busy calendar times published to file, ftp, or http locations and made available to other users)

G

GM.ini: (A file located in the GoldMine directory containing commands for general GoldMine operation. The most important are the SysDir, GoldDir, and CommonDir)

GM+View tab: (User-defined HTML template-based views)

gmb: (The .gmb file extension for a backup file created by the Back-Up Wizard)

GoldDir: (Used in the GM.ini, the GoldDir specifies the location of your GoldMine files (also called your GMBase files))

GoldMine Business Contact Manager: (An installation of GoldMine using a D-License and a dBASE database)

GoldMine Business Contact Manager Corporate Edition: (An installation of GoldMine using an E-License and an optional SQL database. Includes GoldSync)

GoldMine e-mail: (E-mail message to another GoldMine user or user group)

GoldMine files: (The tables storing other database information. Also referred to as GMBase files. The GoldDir line in the GM.ini points to the shared GoldMine files)

GoldMine link to Excel: (Creates a link between GoldMine and Excel, allowing you to add GoldMine fields to Excel or export data from Excel to GoldMine)

GoldMine link to Word: (Creates a link between GoldMine and Word, allowing you to add GoldMine fields to a Word document or template)

GoldSync Server: (A computer that handles the synchronization processes)

GoldSync Service: (Runs the GoldSync application in the background without requiring a user to launch GoldMine)

Group: (Fixed set of contact records that meet an initial set of conditions. Once selected, member records subsequently have instantaneous access to the subset. Alternate method to filters of maintaining a subset of data)

H

History tab: (Completed activities associated with the Contact Record)

HTML: (HyperText Markup Language. The authoring language used to define the structure and layout of a Web document by using a variety of tags and attributes)

Hyperlink: (An element in an electronic document that links to another place in the same document or to an entirely different document. Click on the hyperlink to follow the link)

I

IIS: (Internet Information Services)

InfoCenter: (A resource used to maintain and display any type of information useful to an organization or an individual. The InfoCenter can archive information in a variety of formats, such as graphics, multimedia files, and program applications. Any of this information can be linked to a Contact Record)

Installing locally: (Installing GoldMine .exes and .dlls on a local workstation in a network environment)

Instant sync: (Automatically reminds undocked users to synchronize whenever a connection GoldSync is detected)

Internet e-mail: (E-mail message to customers using you POP3 e-mail account)

K

Keyboard shortcuts: See Shortcut keys

Keyword: (One or more words that succinctly describe a document's contents)

KnowledgeBase: (Information created by, for, and about an organization and available to multiple users)

L

Linked activities: (Scheduled activities linked to a contact record)

Links tab: (Documents, programs, and other files linked to the Contact Record)

Local menu: (Also known as a shortcut menu, the local menu provides quick access to a set of commands affecting only the current browse window, tab, or pane)

LogStamp: (Contains the time and date that the record was last changed)

M

Macros: (A series of commands and/or keystrokes that launches or runs a action)

Maintaining: (Process to improve performance by regenerating indexes, packing and rebuilding tables, and sorting and verifying data. The maintenance of the database should be performed by the system administrator or manager)

Members tab: (Lists the contact Groups of which the Contact Record is a member)

Merge codes: (Three-character codes used as the basis for e-mail and document merging for mass mailings)

N

Net-Update: (Process of updating GoldMine over the Internet)

Notes tab: (Free text notes associated with each Contact Record)

O

ODBC: (Open Database Connectivity)

Operator: (Specifies the value a field must have to be included in a record selection criteria. Examples of operators include the following: equal to, greater than, lesser than or equal to)

Opportunity: (Involves a group working as a team with multiple organizations and contacts to successfully close a complex sale)

Opptys tab: (Displays the Opportunities associated with the Contact Record)

Organization Chart: (Graphically displays contact information and organizational relationships in a tree structure)

P

Packing: (The process of actually deleting records that were marked for deletion. This process is only necessary for a dBASE database. Periodically packing the database files removes the “dead space” between records)

Pending tab: (Activities scheduled for the Contact Record)

Personal Base: (Information useful to an individual user that only the logged-in user can view and update)

Primary contact: (The name of the contact on the Contact record)

Primary fields views: (Primary field views are customized views of the primary fields. Primary fields are those in the upper four panes of a Contact Record and are Contact1 fields)

Project: (Involves a group working as a team to complete a long-term project that involves multiple component tasks)

Projects tab: (Displays the Projects associated with the Contact Record)

R

Rebuilding: (Creates a new file structure (or table), and copies data, record-by-record, from the old files/tables to the new ones)

Record curtaining: (A Contact record can be curtained so that a user who does not own the record cannot view the record or can view only part of the record)

Record types: (Customized combination of primary fields views, custom screens, and GM+Views. Configured in the Record Types Administration Center)

Record Types Administration Center: (Allows you to create many Record Types based on combinations of your different Primary Field Views, Custom Screens, and GM+Views and to apply them based on your user-defined Record Type Rules)

Record typing: (Customized combinations of Primary Fields Views, Custom Screens, and GM+Views)

Rectype: (A record type code identifying different types of records within the database)

Referrals tab: (Internal referrals within the Contact Set)

Rehost: (Rehosting data is the process where one database is copied or converted to a new database)

Reports Center: (Provides easy visual access to several reporting options available within GoldMine)

Required field: (A field requiring data)

Resources: (Resources that are commonly requested include conference rooms, projectors, demonstration products, company vehicles)

Rich Site Summary: (See RSS)

RSS: (Rich Site Summary -- a simple XML format designed for sharing Web Headlines)

S

Screen design toolbar: (Used when you are designing your primary fields or Fields tab screens)

Seq: (Sequence ordered number for each event in an Automated Process. The sequence number begins with either P for a Preemptive event or S for a Sequential event. Each event is processed in order based on the sequence number)

Shortcut keys: (Shortcut keys are keyboard keys or key combinations that invoke a particular command)

Shortcut menu: See Local Menu

Site code: (Matches a synchronization process to a site)

Sort Header: (A section in a report that holds the labels, filters, and break filters for the section or for the corresponding detail section)

Sort order: (The order that Contact records are displayed based on a specified field. The sort order for the database is determined by the Sort Order you select in the Contact Listing window. If a filter or group is active, the Sort Field you selected takes precedence)

Sorting: (Orders the records in the files/tables by the most-used indexes)

Summary tab: (Displays activity information about the current Contact Record)

Synchronization: (GoldMine's remote synchronization is a process that can update one GoldMine system with new or changed information that has been entered in another GoldMine system)

SyncStamp: (Contains the time and date when the record was last successfully retrieved during synchronization)

SysDir: (Used in the GM.ini, it specifies the location of gmw6.exe)

T

Task group: (A group of task items on the GoldMine Taskbar)

Task item: (An item on a taskbar that launches an action)

Taskbar: (Frequently used GoldMine Menu commands and macros, links to documents and files, and a quick step for launching applications and websites)

Tickets tab: (Displays tickets from HEAT Call Logging when GoldMine/HEAT integration is installed)

Tlogs: (The general name for the two types of logs: ContTlog and GMTlog. They track date and time stamps for changes to fields and the synchronization of the data)

Track: (A sequence of two or more events, which are the step-by-step instructions that GoldMine evaluates to perform a defined series of activities. Also known as an Automated Process.)

Tracks tab: (Lists the Automated Process tracks attached to the Contact Record)

Transfer set: (A database of all the changes made to Contact Records during a specified time frame. The database with the changes is sent to other GoldMine locations and retrieved, updating that database with the new information)

Transformation sheet: (A language for transforming XML documents into other XML documents)

Trigger: (A predefined condition in an Automated Process event that, when the condition is true, causes GoldMine to execute an action)

U

Unlinked activities: (Scheduled activities that are linked to a user but not to a contact)

URL: (Abbreviation of Uniform Resource Locator, the global address of documents and other resources on the World Wide Web)

User groups: (Users can be logically grouped according the functions that they perform)

User Preferences: (Various settings that control how GoldMine looks and acts for each user)

User Properties: (These settings define a user's security and access in GoldMine)

UserID: (Field that contains the name of the user an activity is assigned to. UserID is based on the GoldMine username)

Username: (Use this name to log into GoldMine. Identifies the user's activities)

Username.ini: (An initialization file located in the GoldMine directory that stores user's individual settings)

Username.tbi: (Stores the user's taskbar settings)

V

Verifying: (Ensures that the data is readable and that all sync fields in the synchronization records of the database file(s) are populated, and no unique fields are duplicated)

W

WYSIWYG: (What You See Is What You Get. Pronounced wizzy-wig. A WYSIWYG display allows you to see on the screen exactly what will appear when the document is printed)

X

XML: (Acronym for Extensible Markup Language. XML is a universal format that uses tags for exchanging structured documents and data on the Internet)

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